

Board Task Checklist

Term 3 - 2026



Use this checklist alongside your board's workplan to complete your tasks for this term.

Task	Click on the blue links to:
Strategic Planning and Reporting	
Begin community consultation for your 2027-2028 strategic plan. By now, you should have identified the members of your school community and planned how you will connect with them. Now it's time to begin engaging and gathering meaningful input to inform your planning.	Find out more about • Strategic Planning and Reporting • Community Engagement
Student Representative Elections (Schools with students above Year 9)	
Hold your student election. If using the recommended common date of 3rd September, you must appoint your returning officer by 3rd August. Otherwise, use our Election Planner Tool to determine your timeline.	Find out more about • Student Elections • Election Planner Tool • Student Representative Promotional Material
Induct the new student representative to your board A well-planned induction will help your new board member get up to speed quickly and confidently. Make sure they attend a Welcome on Board – New Student Representatives session at the beginning of Term 4 to learn more about their role.	Find out more about • Board member induction
Student Achievement	
Conduct your mid-year student achievement review. It's good practice to seek assurance that all students are progressing as they should, and that plans are in place to support those who are not. This may also highlight areas requiring further board discussion.	Find out more about • Student Achievement & the National Curriculum Upskill in the Learning Library • Student Achievement – What We're All Here For
Finance	
Conduct your mid-year budget review. To ensure your finances are on track, it's good practice to conduct a mid-year budget review after receiving your June year-to-date financial reports.	Find out more about • Budgeting in schools Upskill in the Learning Library • The Board's Role in Finance

Board as Employer of Principals	
Review the arrangements you have in place for board-funded mobile phones or reimbursement of mobile phone costs. Ensure the provision and use of board-funded mobile phones, and any reimbursement of mobile phone costs, are managed in a way that is clear, transparent, fiscally responsible, and protects public funds and privacy.	Find out more about • Guidelines for board-funded mobile phone arrangements
Board Policy Review	
Review your community engagement policies and procedures. Your board should have a plan to review your policies regularly. Each term, we highlight a policy area you could focus on. For Term 3, we suggest reviewing policies and procedures relating to Community Engagement. We recommend reading our Resource Centre articles to check your understanding before reviewing your policy.	Find out more about • Community Engagement
Staggered (Mid-Term) Elections – March 2027	
Appoint a Returning Officer (RO) if your board is on a mid-term election cycle. The staggered (mid-term) elections will be held on 31 March 2027. This means you'll need to appoint an RO by 27 January 2027 at the latest. Don't get caught out by the summer holidays – appoint your RO as soon as possible so they can start the process in Term 4.	Find out more about • Staggered (mid-term) elections • Election Planner Tool • Appoint a Returning Officer (RO)
Learning and Development Opportunities	
Enrol in a workshop or webinar. You can attend a workshop (in-person or online) or join a webinar. Coming up this term: • Concerns and Complaints • Strategic Planning and Reporting	Enrol in a live event • Northland • Auckland • Waikato • Bay of Plenty • Central East • Central West • Wellington/Wairarapa • Nelson/Marlborough/West Coast • Canterbury • Otago • Southland

Visit the Learning Library. You'll find recordings and resources from past events.	Browse the Learning Library • Learning Library Check out our latest offerings • Being a Good Employer – The Board's Role • Reporting to Parents & Whānau, and SMART – What's Changing in 2026 • Student Achievement – What We're All Here For
Need something else? Contact us to discuss your needs.	Contact Us • 0800 782 435 • govadvice@govhub.org.nz
Housekeeping	
Check your progress. Ensure your board has completed all its tasks from the previous term.	Find out more about • Board Task Checklists • Principal Task Checklists
Check the requirements for filling any board member vacancies. Have there been any resignations since your last board meeting? When someone leaves the board, there are obligations to meet and processes to follow.	Find out more about • Elections, Vacancies & Succession Planning
Tell the Ministry of Education (and us) about any board changes using the School Board Updates form. Submit this form whenever a member joins or leaves, and when the presiding member changes. We also recommend keeping a board member register to easily confirm your board's current composition.	Find out more about • Board member register and school board updates form



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