

Principal Task Checklist

Term 3 – 2026



These tasks are common to most principals as the board's chief executive, in relation to their school's control and management. Use this information alongside the Board's Term Task Checklist to complete your tasks for this term.

Task	Click on the blue links to:
Collective Agreement Changes	
Primary and Area School Teachers	
Implement the outcomes of settled collective agreement bargaining ☐ Review and implement any changes arising from settled collective agreements that apply to your staff.	Find out about the key changes and actions required from the settlement of the: Primary Teachers' Collective Agreement 2026–2028 Area School Teachers' Collective Agreement 2026–2028
Support Staff	
Implement the outcomes of settled collective agreement bargaining ☐ Review and implement any changes arising from settled collective agreements that apply to your staff.	Find out about the key changes and actions required from the settlement of the: Support Staff in Schools and Kaiārahi i te Reo and Therapists' Collective Agreements 2026–2028 Access the latest letter of offer templates: Permanent employment letters of offer Fixed term employment letters of offer Casual employment letters of offer
Review and apply the new variation of hours clauses in the Support Staff in Schools' Collective Agreement (SSSCA). ☐ Review clauses 2.5 and 2.6. ☐ Ensure you (and those responsible for support staff) understand the implications of the changed wording and apply it correctly.	
Use the latest compliant letter of offer template. ☐ Cease using any support staff letter of offer templates saved on your computer, as these versions are now out-of-date and do not reflect the new requirements of clause 2.5 of the SSSCA. ☐ Download a fresh copy each time you appoint to ensure you are using the most current and compliant version.	
Move non-teaching Guidance Counsellors from their out-of-date IEA to the SSSCA (or promulgated individual employment agreement) ☐ Advise non-teaching guidance counsellors of the required update to their employment agreement following the expansion of SSSCA coverage to their work, and complete any follow-up actions based on their response.	

☐ Process the required EdPay actions to reflect the change to their employment agreement in the payroll system. ☐ Use the "Support Staff – Other Support Staff" letter of offer templates for all new appointments of non-teaching guidance counsellors.	
Apply best practice when managing conduct and performance concerns involving non-teaching staff ☐ Ensure you (and those responsible for support staff) understand and apply the relevant provisions consistent with best practice and your legal obligations. ☐ Review the new or updated clauses: ○ 8.1 – 8.3 of the Support Staff in Schools' Collective Agreement. ○ 8.1 – 8.3 of the Kaiārahi i te Reo and Therapists' Collective Agreement. ○ 7.1 – 7.3 of the Caretakers', Cleaners' and Canteen Staff Collective Agreement. ○ 9.1 – 9.3 of the Community Education Collective Agreement (if applicable to your school). ○ 8.1 – 8.3 of the Specialist Residential Schools' Collective Agreement (if applicable to your school).	Find out about • Performance Management and Conduct for Support Staff
Recruitment	
Ensure key information is collected during recruitment so it is available for decision-making. ☐ Use application forms as part of the recruitment process.	Find out more about recruitment and download template application forms: • Advertising and job descriptions
Individual Employment Agreements (IEA)	
Check that non-union staff are employed correctly, and the new notification requirements are applied. ☐ If not already completed, offer the new IEA to employees covered by the SSSCA, KRTCA, PTCA and ASTCA so they can obtain the latest terms and conditions. ☐ Ensure staff responsible for onboarding and HR administration understand and apply the new requirements for employing non-union staff (replacing the 30-day rule).	Find out more about: • Offering employment in a unionised environment • Support Staff in Schools and Kaiārahi i te Reo and Therapists' Collective Agreements 2026 – 2028 • Primary Teachers' Collective Agreement 2026-2028 • Area School Teachers' Collective Agreement 2026-2028

Provisional Staffing Notice	
Prepare for your September Provisional Staffing Entitlement Notice (based on your July Roll Return). ☐ Check that any current fixed-term teacher appointments are based on genuine reasons. If they're not, they may need to be treated as permanent employees in any surplus staffing situation. ☐ Contact GovHub if you require assistance. ☐ When you receive your Provisional Staffing Entitlement Notice, confirm whether your staffing levels need to be reduced or reviewed.	Find out more about • Reviews and Restructures • Fixed term employment agreements Enrol in our upcoming webinar series • Navigating Surplus Staffing
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: ☐ Navigating Surplus Staffing ☐ 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 • Principals Workshop: Support Staff in Schools Collective Agreement (SSSCA) – Implementing the Changes • 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 • eradvice@govhub.org.nz

Housekeeping

Check your progress.

- ☐ Ensure you have completed all your tasks from the previous term.

Find out more about

[Principal Task Checklists](#)

[Board Task Checklists](#)



Advisory and Support Centre

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Learning Events

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Resource Centre

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