



NZSTA

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Governance support resources

Succession planning

Succession planning helps to ensure that boards are prepared for board members to come and go from the board.

The key parts of succession planning are:

- Readiness
- Recruitment
- Retention

Readiness

Boards should ensure they have up-to-date documentation in place to allow new board members (whether they be elected, selected, co-opted or appointed) to understand and be part of their board in effectively governing their school. This could include:

- information about the board and school staff:
 - the board member register
 - schedule of delegations, including any board committees
 - board roles and responsibilities policy
 - school staff organisation chart
- other board policies and plans. Include:
 - code of behaviour policy
 - the board's work plan
 - charter/strategic plan
 - annual implementation plans
 - latest annual report, including analysis of variance
- board meeting information
 - a schedule of upcoming board meetings
 - minutes of the last three open board meetings
 - principal's reports to the last three open board meetings – include supporting documents
- current school status information
 - last three finance and property reports to the board
 - the latest ERO review report
 - details of any current Ministry of Education interventions / support at governance level
 - current budget

Recruitment

Recruitment is an ongoing activity. Even outside of an election year boards can promote their work to their school community. If people see and understand the board's contribution to the school, they may be more likely to stand at election time or agree to being co-opted or appointed.

Boards should:

- regularly look for opportunities to engage with their school communities
- have up-to-date information on the school website. This should include:
 - who the board members are
 - how to contact the board
 - the board's charter / strategic plan and annual plan
 - the board's last annual report (publishing this on the school's website is a legal requirement)
 - the board's policies
 - minutes of previous open meetings
- provide information to aspiring board members about the role of the board and the relevant skills, experience and behaviour required of school board members.

Recruitment resources

You can find information to help with recruitment in the following sections of our website:

- [Becoming a Board Member](#) – this section is targeted at aspiring school board members who want to find out more information
- [Promotional material](#) – here you will find resources such as posters, flyers and digital images to help promote school board elections
- [Kōrari promotional material](#) – NZSTA offers Kōrari workshops in election years to help people understand the role of school boards and to inspire them to get involved. On this page you will find information to promote these workshops including promotional videos.

Retention

Board members who are supported are more likely to stay on a board. Key ways for the board to do this are by providing a well-thought out induction programme for new board members; by encouraging positive board relationships and by valuing the work of the board.

Induction programme

All new board members should be taken through an induction programme. Following the triennials and mid-terms (for boards using a staggered election cycle) this could include:

Welcome letter

The presiding member (chair) sends a letter of welcome to each new board member:

- congratulating them on the election result, and
- inviting them to an induction session prior to their first formal board meeting

Information folder

The board secretary provides a folder of board information. The folder should include the items described in the Readiness section above.

Induction session

The presiding member and the principal:

- take the new board members on a tour of the school
- take them through the resources provided in the board member folder to ensure they understand the information
- ensure they understand the requirements of the presiding member role
- have them sign and agree to work within the code of behaviour
- the presiding member:
 - checks they have completed [Appendix 2](#), so that NZSTA is able to offer them advisory and professional development services.
 - encourages the new board members to attend NZSTA professional development workshops and have a look at the online learning opportunities on [NZSTA Knowledge Hub](#).

Positive board relationships and valuing the work of the board

Ways the board can encourage positive board relationships and value its work:

- elect an effective presiding member
- all board members follow the code of behaviour policy
- make sure there is a planned induction programme
- support attendance at board member professional development opportunities provided by NZSTA
- evaluate each board meeting
- build relationships between board members
- review board performance
 - ensure there is a review programme in place
 - implement the review programme
 - seek advice and professional development opportunities from NZSTA

Useful Links

[Planning effective triennial election outcomes](#)

[Trustee elections website](#)

[Education website](#)

[NZSTA Governance framework 2018](#)

Preparing for the Triennials

Resources and information for boards

About board elections and funding

Free, sample governance (policy) framework



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For further advice please contact the Advisory and Support Centre on 0800 782 435, option 1 or email govadvice@nzsta.org.nz