**Beat the Heat!**

**Induction for Newly appointed**

**Principals**

***To Do List per Quarter***

(To Do List for the year)

Working under pressure goes with the territory when you are

a manager. But there is a relationship between pressure and performance that means you can do your best work when the “heat is on”.

This Annexure aims to assist the newly appointed principal to develop systems and structures for functional school administration relevant for the specific term. This list may not be conclusive but guides fundamental activities.

The following Activities need to take place during the upcoming year and are the responsibility of the principal:

TERM 1

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| **TOPIC** | **ACTIVITY** | **POINTERS/ TIPS** |
| HR related | Growth post | * Align staff establishment with learner numbers (1 additional staff member for every 50 additional learners) * Apply to PED for additional post and WAIT FOR APPROVAL, DO NOT JUST APPOINT! |
| Induction of new staff | * Allocate a mentor for each new staff member * Orientate to the school environment and procedures * Plan for student teachers |
| Staff committee | * Establish in consultation with the staff |
| Extra mural activities | * Ensure staff participation (IQMS Performance Standard 7) * Draw up an organogram * Align with the Year Plan |
| Year Plan | * Revise the plan |
| PMDS (PS staff) | * Submission of evaluation documents (Quarterly review) |
| IQMS | * Refer to Annexure 6 for Management Plan |
| Staff | * Meetings (minuted) |
| Finance related | Stakeholders meeting | * Finance report (AGM Resolutions) * Prepare for audit * Process exemption applications (fee paying schools) * ***Remember: Department’s financial year runs from April – March!*** |
| Teaching and Learning | Curriculum Management | * Ensure ATP is available per subject * Ensure Subject meetings give clear guidelines on:   Teacher files  Class visits (Yearly)  Book control (Yearly)  Assessment (Informal and Formal for the year)  Progress report (Termly)   * Application for change of subject (refer to Policy) * Identification for concessions (SBST) |
| Stakeholders meeting | * Academic report by principal (end of year results) |
| Timetable | * Review allocations * Address clashes (if any) * Communicate Annual Assessment Plan to the parents |
| Surveys | * School Readiness * 10th day survey * Annual survey * Infrastructure survey * KEEP A COPY ON FILE! |
| LTSM | * Verify quantities and distribution (issuing) |
| Intervention programmes | * Draw up a timetable for intervention of retained learners, communicate to parents * Have you finalised SBA for the term? * Are the marks captured as per Dept data base/ dashboard? |
| Orientation of new learners | * Orientate to the school environment and procedures * Familiarise them with Code of Conduct |
| RCL (Secondary schools) | * Elections and induction * Meetings (minuted) |
| School Governing Body | Elections | * Filling of vacancies: * Co-opting of members (3 months) * By-election (SET) * Election of executive * Allocation of members to portfolio committees * Ensure minutes are kept |
| Policies | * Amendments and ratifications of Policies |
| Meeting | * At least once per term * Ensure minutes are kept |

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| **TOPIC**  TERM 2 | **ACTIVITY** | **POINTERS/ TIPS** |
| HR related | Filling of vacancies  In line with Post Establishment  (verify with HRP unit) | * Have you submitted GDE 79? * Have you checked the post description in the Gazette? * Have you drafted the school’s Management Plan in consultation with SGB? * Have you invited the unions? (Keep copies) * Have you arranged for short listing invitations and interviews? (Keep copies) * Have you confirmed the short listing and interview panel? * Inform candidates at least 5 days in advance and arrange hosting at school. * Have you arranged for a scribe to minute short listing and interviews and proper safekeeping of all docs? * ***Remember: all panellists should sign confidentiality agreement.*** * Complete relevant docs for recommendation and ensure ALL panellists have signed. (Keep a copy). * Submit 2R and attach copies of all 3 recommended candidates. * ***Remember: SGB only recommends – DO NOT APPOINT!*** |
| Extension of contracts | * Have you submitted GDE 1? (At least 1 month before assumption of duty). * ***Remember: SGB chair to sign.*** * Note: GDE 1 is an application and does not automatically mean appointment. Excess staff may be placed in such a post. * ***Remember: Do not make any promises to staff!*** |
| HR related | Acting in a promotion post (PL2 – PL 4) | * Have you submitted relevant form? (At least 1 month before assumption of duty) * ***Remember: SGB chair to sign and write a Motivational letter.*** * Note: This is an application and does not automatically mean appointment. Excess staff may be placed in such a post. * ***Remember: Do not make any promises to staff!*** |
| HR related | PS Staff (GA’s and AA’s) | * Have you submitted the Annual Performance Assessment as part of PMDS? * Have you contracted all PS staff for new cycle? * Have you submitted the term’s attendance stats? ***Remember: submission on last day of quarter*** |
| CS staff (School based educators) | * Have you submitted your School Improvement Plan (IQMS)? * Has the SDT compiled a Development Plan based on PGP’s? * Have you submitted the term’s attendance stats? * ***Remember: submission on last day of quarter*** |
| IQMS | * Refer to Annexure 6 for Management Plan |
| Staff | * Meetings (minuted) |
| Finance related | Audit | * Has the SGB appointed the auditor? (Refer to AGM/SGB minutes) * Is the audit completed? * Is the Audited Statement approved by the SGB? * Submit audited Financial Statement to District by end of June. * ***Remember: non-submission of audited statement can delay payment or result in non-payment of resource allocation.*** |
| Sect 38 A | * SGB apply for permission to pay Additional remuneration (next year) to state employed employees by end of June. * Included in budget and tabled at AGM. |
| Review of budget | * Have you received the Final Resource Allocation for the current year? * Have you reviewed your budget based on above? * Compare cost centre expenditure against budget (actual against budgeted amounts). * Have you aligned your budget to the ring-fenced amounts? * Any transfer of ring fenced monies from one item to another must be pre-approved by the HOD. * Have you applied for Compensation of School Fee Exemptions (end of June)? * Is your Petty Cash balanced? * Are you PFMA compliant? * ***Remember: a school’s budget is zero based.*** |
| Procurement | * All procurement processes must be PFMA compliant – minimum 3 quotations. * ***Remember: File all quotations for forensic audit purposes*** * ***Remember: Guard against conflict of interest during procurement processes.*** |
| Teaching and Learning related | Curriculum Management | * Data analysis Term 1 * Term plan for Dept/ Subject meetings   (Minutes available and verified)   * Term plan for Curriculum Support * Academic Intervention Plan |
| Surveys | * School Readiness |
| Examinations | * Plan for mid-year exam (Template attached) * ***Remember: Verify with Exams Unit on possible provincial/ national papers.*** |
| Registration for external exams | * Have you applied for learner concessions * Are all registration forms neatly completed and signed by parents and learners? * ***Remember: principal to verify information on registration form before signing.*** * Are all learners ID’s copied and certified? * Have you finalised SBA for the term? * Are the marks captured as per Dept data base/ dashboard? |
| Year Plan | * Have you reviewed the Year Plan? |
| Admissions | * Have you started the process in line with Provincial guidelines? * Has the SGB amended and ratified the school’s Admissions Policy? |
| Learner Attendance | * Have you submitted the term’s attendance stats? * ***Remember: submission on last day of quarter*** |
| School Governing Body | Meeting | * At least once per term * Ensure minutes are kept |

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| **TOPIC**  TERM 3 | **ACTIVITY** | **POINTERS/ TIPS** |
| HR related | PMDS (PS staff) | * Submission of evaluation documents (Quarterly review) |
| IQMS | * Refer to Annexure 6 for Management Plan |
| Staffing | * Identify excess staff and vacancies based on staff allocation (PPM) |
| Staff | * Meetings (minuted) |
| Finance related | AGM | * Start planning AGM * Written Notice issued ONE month in advance |
| Budget | * Draft budget with cost centres * Obtain at least three quotes for procurement processes * Table budget at SGB meeting * Available to parent 14 days prior to AGM. |
| Teaching and Learning | Curriculum Management | * Data analysis Term 2 * Term plan for Dept/ Subject meetings   (Minutes available and verified)   * Term plan for Curriculum Support * Academic Intervention Plan |
| Year Plan | * Have you reviewed the Year Plan? |
| Surveys | * School Readiness |
| Admission | * Have you finalised the admission process? Have you done an audit of available spaces? * Submit statistics to Dept. (Weekly) * Use only Waiting List A * Accept late applications * Confirm acceptance of admission with parents |
| LTSM | * Audit of LTSM and report to Dept. * Obtain at least three quotes for procurement processes and place orders (Keep copies) * Order workbooks from Dept. * Have you ordered stationary for the final exams? |
|  | Examinations | * Do you have a management plan for the final exams? * Planning for preparatory examinations (Secondary schools) * Execution of prep exams * State of readiness audit for final exams * Plan for end-year exam (Template attached) * Have you finalised SBA for the year? * Are the marks captured as per Dept data base/dashboard? |
| School Governing Body | Meeting | * At least once per term * Ensure minutes are kept |

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| **TOPIC**  TERM 4 | **ACTIVITY** | **POINTERS/ TIPS** |
| HR related | PMDS (PS staff) | * Submission of evaluation documents (Quarterly review) |
| IQMS | * Refer to Annexure 6 for Management Plan |
| Staffing | * Identify vacancies * Procure staff |
| Staff | * Meetings (minuted) |
| School Governing Body | Meeting | * At least once per term * Ensure minutes are kept |
| Finance related | Budget | * Present finalised budget at AGM for approval |
| Teaching and Learning | Curriculum Management | * Data analysis Term 3 * Term plan for Dept/ Subject meetings   (Minutes available and verified)   * Term plan for Curriculum Support * Academic Intervention Plan * Preparation for exams (demarcation given) |
| Year Plan | * Have you reviewed the Year Plan? |
|  | Surveys | * School Readiness for next year |
|  | Admissions | * Accept/ refer late applications (Comply with GDE procedure) * Prepare transfer cards for departing learners * Confirm numbers per grade/ per subject |
|  | LTSM | * Retrieval plan * Receive and record deliveries (Keep copies) * Write off vandalised/ lost books and order top ups. * Have you updated the asset register with the new deliveries? * Distribution plan? |
|  | Timetable | * Draw up a draft timetable for the new academic year * Take note of the Notional time and equitable work distribution for educators |
|  | Examinations | * Have you finalised SBA for the year? * Have you submitted final SBA marks as per Dept management plan? * Are the marks captured as per Dept data base/ dashboard? * Is your End of Year Exam Management Plan drafted and communicated? |
|  | Administration | * Is the Management Plan finalised for the start of the new academic year? |