

# Professional Development fund criteria

Updated: 24 March 2026

## Preamble

The Primary Principal's (PPCBU) Collective Agreement provides an entitlement for principals covered by this collective agreement, or a relevant Individual Employment Agreement (IEA), to access up to \$15,000 across the term of the collective agreement for professional development activities in accordance with these criteria agreed between the Ministry of Education and the Primary Principals' Collective Bargaining Union (PPCBU).

**This provision is in addition to existing professional development budget a school may allocate to principals for their usual professional learning and development (PLD) needs agreed with their School Board.**

The parties recognise that principals may have specific PLD needs that are not available in the PLD fund criteria. These should be considered as part of the Board's usual processes for considering principal PLD, separate from this entitlement.

## Provision for PLD fund with option to convert to a Curriculum Change Allowance

Principals and School Boards should be aware of the administrative conditions that apply to this PLD fund provision.

Under clause 6.2.15 of the PPCA-PPCBU, principals may elect for each tranche of the \$15,000 entitlement to be **either**:

- paid to the school as part of the Professional Development (PLD) fund, to be used in accordance with these criteria below, or
- paid directly to the principal as a Curriculum Change Allowance (provided that they have not already committed the tranche to PLD).

The entitlement is paid in five tranches of \$3,000. For each tranche the principal must notify the Ministry of Education by each cut-off date if they wish to receive the payment as a Curriculum Change Allowance. If no election is made by each cut-off date, the payment will automatically be made as a PLD fund held by the School Board for use by the principal in accordance with the criteria below.

### **Eligibility**

The PLD fund or curriculum change allowance is applicable to principal's covered by the PPCA-PPCBU agreement or relevant IEA.

Principals on leave without pay during the relevant period will not receive a payment. Principals can apply for the tranche on their return to work if their leave without pay was for less than 6 months by contacting the Ministry Employment Relations team [employment.relations@education.govt.nz](mailto:employment.relations@education.govt.nz).

## **Where a principal elects receive the payment as a Curriculum Change Allowance**

The Curriculum Change allowance recognises the work involved in leading curriculum reform of the term of the agreement. This allowance is paid as a taxable payroll allowance to be used at the principal's discretion. It is not connected to the PLD fund criteria.

## **Where a principal receives the PLD fund (paid to the school)**

School Boards are responsible for approving use of the fund for principals to attend professional development activities in line with the following criteria, and any fair and reasonable travel and incidental expenses.

Boards should consider the purpose and value of the activity requested and assess how it relates to their school's strategic goals and leadership opportunities for their school's leader. Board minutes must document the approval decision and alignment with the fund criteria.

### ***PLD fund Criteria:***

#### **1. Opportunities on the Principal Development Map (PDM)**

The fund can be used for any activities listed on the PDM: [Ministry of Education PDM](#)

The PDM, developed by the Ministry of Education and the New Zealand Principals' Federation, serves as a directory of professional support pathways for school leadership. It is designed to help principals identify opportunities that align with their professional development needs.

Principals are encouraged to exercise their judgement in selecting activities from the PDM, ensuring they are relevant, impactful, and suited to the specific leadership context of their school. Boards need to consider the costs associated with events.

The PDM will continue to be updated to include accredited learning events and providers of supervision and coaching. More information about what can be listed on the PDM is available here: [Principal Development Map | Education Workforce](#)

#### **2. Additional professional learning activities eligible for fund use**

Professional learning activities that are not listed on the PDM but meet the criteria below are equally eligible for support from this fund. Boards can consider approving the use of the professional development fund for opportunities that they deem to be relevant to the school, appropriate use of funding, and aligned with the following criteria:

##### **A. Study Tours**

Study Tours are an opportunity for principals to collectively visit other schools to share and develop professional practice.

The fund can be used for Study Tours that:

- are within New Zealand and Australia,
- have a set schedule of events/school visits, which identify the strategic purpose of each event,
- have clear costs which are relevant to the professional learning,
- have a stated focus with intended outcomes that are specific to principals and school leadership in New Zealand,
- organised or endorsed by a principals' association, or peak body, government education agency, or international leadership centre, and
- the principal agrees the outcomes will be recorded in the Professional Growth Cycle and shared with the Board.

#### **B. Professional Learning Groups (PLGs)**

PLGs enable principals to work together to identify shared learning opportunities, which may involve events, facilitators, or venues.

The fund can be used for PLG activities that:

- have component activities that may be delivered within New Zealand and Australia,
- the activity is specified and has clear costs which are relevant to the principal's professional learning, and
- the principal agrees the PLG activity outcomes will be recorded in the Professional Growth Cycle and shared with the Board.

#### **C. Education Fellowships**

Where a principal is awarded a Fellowship by an association in conjunction with the Ministry (e.g. APPA, CPPA, Wolf Fischer), principals can use the fund for other events or activities that directly support and advance the agreed goals of the Fellowship. These opportunities should clearly contribute to the principal's professional learning, leadership development, or related outcomes identified in the Fellowship plan. Boards are responsible for determining whether the PLD is relevant to their school and the costs are appropriate.

#### **D. International Conferences**

International conferences proposed by the PPCBU have been selected for use of the fund based on relevance to leadership and learning in New Zealand. Boards are responsible for determining whether the PLD is relevant to their school and the costs are appropriate.

- World EduLead, Singapore
- uLead, Banff Canada
- ISTE Live 26, Orlando Florida (This conference offers online attendance).

**Note:** This criteria V2.0 has been finalised with agreement between the Ministry of Education and the PPCBU. Parties recognise that these criteria may need to be reviewed over the term of the agreement.

### 3. Travel and incidental expenses

Actual and reasonable incidental expenses necessary for attending eligible activities for the principal —such as travel and accommodation—may be covered by the fund, in accordance with a school’s usual policy for travel expenses or sensitive expenditure.

Boards must approve expenditure costs and consider reasonable expenses in line with the school’s own sensitive expenditure policies. Boards should consider the Auditor General’s good practice guide about sensitive expenditure. Board members are encouraged to seek advice from NZSBA or their Ministry of Education School Finance Advisor if they have any doubt.

- [Office of the Auditor General – Controlling sensitive expenditure: Guide for public organisations](#)
- [Part 3: Matters identified during our audits — Office of the Auditor-General New Zealand](#)
- Section 2.2 [Financial-Information-for-Schools-Handbook 131125.pdf](#)
- [Ministry of Education School Finance Advisor Contact Information](#)

For clarity: Expenses can only include the actual cost of economy class airfare to and from the location of the event, reasonable accommodation for the period of the training (including one night before and/or after the event if this required for transport), ground transport to and from accommodation and/or to and from training venues, and meals (excluding alcohol). If the principal is not travelling alone then only the costs applicable to the principal should be met by the board.

## Administrative process

### Process for the tranche payment

Where the PPCA-PPCBU applies, the \$15,000 fund will be paid to schools in five \$3,000 tranches over the term of the agreement, **unless** the principal has nominated to receive the tranche as a Curriculum Change allowance, in accordance with 6.2.15 (the nomination must occur for each tranche).

The PLD payments will be made within four weeks following the pay period schedule for the allowance:

Tranche	Notification cut-off date	Pay period	PLD fund payment (option to nominate as Curriculum Change Allowance Payment)
Tranche 1	14 April 2026*	4 – 17 March 2026*	\$3,000
Tranche 2	5 August 2026	2 - 15 September 2026	\$3,000
Tranche 3	3 February 2027	3 – 16 March 2027	\$3,000
Tranche 4	4 August 2027	1 – 14 September 2027	\$3,000
Tranche 5	2 February 2028	1 – 14 March 2028	\$3,000

\* For the March 2026 tranche, eligibility is determined by the relevant pay period; however, payments will be processed at a later date. The deadline for principals to complete the Ministry form is 14 April 2026.

Six weeks ahead of the scheduled payment, principals can complete a Ministry of Education form and request to transfer that tranche of the PLD fund to the Curriculum Change allowance.

Where this option is selected, the payment will not be made to the school board as professional development funding. Instead, it will be paid directly to the principal as an allowance through payroll and will be subject to normal PAYE tax deductions.

Unless the principal completes the form by the cut-off date, the PLD fund will be paid to the school for the principal to use in line with the criteria. The fund cannot be transferred to the allowance after it has been paid.

These procedures will not apply where an employee is bound by an IEA entered into before 13 March 2026.

### **The PLD fund follows the principal**

The fund is paid to the School Board to be used by the principal of the school in accordance with the criteria outlined above. If the principal eligible for the fund changes to a different state or state-integrated school, the School Board of the previous school will transfer the remainder of the funds to the new state or state-integrated school. Where a principal's employment terminates and their new employment agreement does not provide for the PLD fund, any unspent part of the fund is forfeited.

### **Financial and audit requirements**

Receipts and an accurate record of how the Principal Development fund is used need to be kept up-to-date and available for auditors. Use of this fund must be documented distinct from general PLD spending.

Board minutes must document the approval decision before the funds are spent. Documentation should include details of how the funding is to be spent, the estimated costs (including any other sources of funding if the cost is greater than the PLD funding), and how the proposal aligns with the fund criteria. NZSBA will provide guidance on reporting requirements.

The fund is intended to be used in the school year that it falls due unless otherwise agreed in writing between the principal and their employer. For accounting purposes, any unspent funding can be carried through to the following year as a tagged cash reserve held by the school. As it is not payable or owed to another party, it does not form a liability at year end for financial reporting purposes.