Pay and Employment Equity Review

Compulsory Schooling Sector

Project Report

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1.1   Background

1.1.1   A review of pay and employment equity for employees in the Compulsory Schooling Sector was undertaken as part of the Government's Pay and Employment Plan of Action to improve pay and employment equity for women.

1.1.2   The review was undertaken by project coordinators and a Tripartite Steering Group comprising representatives from the Ministry of Education, the New Zealand School Trustees Association (NZSTA), and the education sector unions: New Zealand Educational Institute - Te Riu Roa (NZEI Te Riu Roa), New Zealand Post Primary Teachers' Association (PPTA), Service and Food Workers Union (SFWU) and the Public Service Association (PSA).

1.1.3   The steering group investigated three key questions:
- Do men and women receive an equitable share of rewards?
- Do men and women participate equitably in all areas of the school?
- Are men and women treated equitably with respect and fairness?

1.1.4   Pay and employment equity exists when employees' pay and work experience are not affected by factors such as gender or ethnicity. The review was limited to examining gender equity issues that affect women. A desired outcome is to develop response strategies to address issues and work towards a position where the impact and results of organisational policies and practices for women and men are equitable.

1.1.5   Employees included in this review (teachers, principals and support staff[1]) are those employed by boards of trustees in state and integrated schools.   Information about their pay and employment was gained through:
- payroll data held by the Ministry of Education
- reviews held in individual schools through a bipartite approach with employers (principal and/or Board of Trustees) and employees
- online surveys, and
- focus groups.

1.1.6   Where appropriate, research reports and other working party reports were considered for input in order to further inform the relevant pay and employment equity questions.

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[1] For the purposes of this review the term 'support staff ' refers to all staff directly employed by schools who are not teachers, including executive/clerical, caretakers, ground staff, cleaning, nursing, technical and trade staff, teaching assistants, therapists, cafeteria and hostel staff, and special education assistants.

1.2   Key Findings

1.2.1   The steering group found positive areas where pay and employment equity was in evidence. These included the equitable basis on which teachers' base scale salary is determined; some school communities where women and men support staff and teachers reported high levels of respect and fairness; good provision for professional development for all staff; fair assessment of job performance; schools where management was strongly represented by women; and where equitable treatment between men and women, and between occupational groups, was perceived to be the norm.

1.2.2   Notwithstanding these positive findings, there were a number of areas where there were concerns that woman employees may not be receiving an equitable share of rewards, participating equitably in all areas of the school or being treated with respect and fairness. It should be noted that even though some schools reported positively about the areas listed above, there were other schools that reported negatively about the same areas. Given the large size of the sector, which contains approximately 2500 self managing schools, this variation was to be expected.

1.2.3   The gender equity issues identified for groups within the compulsory schooling sector are listed below for each of the key review questions. Fuller descriptions and recommended response strategies follow.

High Priority		***Rewards Issues***
	1	Support staff – some not receiving incremental pay steps when they are due
	2	Support staff – inconsistent grading and placement on scales and steps
	3	Cleaners – work may not be valued appropriately
	4	Teacher aides – work may not be valued appropriately
	5	Support staff and teachers – unjustified use of fixed-term agreements
	6	Teachers – gender disadvantage for women teachers and principals in career advancement
	7	Teachers – inequitable provision of classroom release time or non-contact time for part-time teachers
Contractual Entitlement / Legal	8	Support staff – the ineligibility for annualised pay experienced by fixed term employees
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		Respect and Fairness Issues
	16.	Support staff – lack of clear job descriptions and performance management processes for some employees
	17.	Support staff and teachers – bullying, harassment and discrimination

1.2.4   *High Priority Issues*

The key gender pay and employment equity issues that have been identified as high priority and the recommended response strategy for each issue are listed in fuller detail below.

Issue 1:   Support staff – some not receiving incremental pay steps when they are due

Recommended actions, by whom and timeframe:
(a)   Provide guidance to employers and employees about increment provision and process required. [NZSTA and unions, ongoing].
(b)   Find the means of implementing an automatic alert in the payroll system which will be sent to schools to remind them that an incremental step is due for a staff member. This alert could also prompt schools about the need for a performance appraisal (refer issue 16 below). [Ministry of Education, for implementation in 2009].
(c)   Investigate viability / feasibility of automatic increments. [Ministry of Education during 2008].

Issue 2:   Support staff – inconsistent grading and placement on scales and steps

Recommended actions, by whom and timeframe:
(a)   Develop clearer definitions and criteria for classification of grades and scales. [Support Staff Remuneration Working Party, by 1 September 2008].
(b)   Refer clearer definitions and criteria for support staff grades and scales to the next round of bargaining. [Parties to the collective agreement, 2009].
(c)   Provide agreed guidance and advice to employers and employees on clearer definitions and agreed criteria. [NZSTA and the Ministry of Education and NZEI Te Riu Roa, ongoing].
(d)   Improve collection and recording of information from schools on grades, scales and steps of all support staff (including steps for people on non standard pay rates) to assist future analysis. [Ministry of Education, commencing September 2008].

Issue 3:   Cleaners – work may not be valued appropriately

Recommended actions, by whom and timeframe:
(a)   Conduct a pay investigation for cleaners to determine if the job is evaluated fairly in terms of remuneration. [The Ministry of Education will manage the pay investigation, and will consult with education sector unions and NZSTA to develop the terms of reference; commencing September 2008].

Issue 4:   Teacher Aides – work may not be valued appropriately

Recommended actions, by whom and timeframe:

(a)   Conduct a pay investigation for teacher aides to determine if the job is evaluated fairly in terms of remuneration. [The Ministry of Education will manage the pay investigation, and will consult with education sector unions and NZSTA to develop the terms of reference; commencing September 2008].

Issue 5:   Support staff and teachers – unjustified use of fixed-term agreements

Recommended actions, by whom and timeframe:

(a)   Provide guidance to employers about fixed term agreements. [NZSTA, ongoing].

(b)   Provide advice to employees re legal entitlement with regard to fixed term. [unions, ongoing].

(c)   Explore the size of the issue for support staff and funding arrangements (including sufficiency of funding) that lead to the use of unjustified fixed term positions. [Ministry of Education commencing February 2009].

(d)   Encourage permanent arrangements for those core Ongoing Renewable Resource Scheme (ORRS) funded teachers aides who work in a sizeable group of teacher aides each year in some schools. [NZSTA / NZEI Te Riu Roa and supported by Ministry of Education, by February 2009].

Issue 6:   Teachers – gender disadvantage for women teachers and principals in career advancement

Recommended actions, by whom and timeframe:

(a)   Include pay and employment equity policies and processes into Ministry of Education policy development that impacts on schools. [Ministry of Education, ongoing].

(b)   Explore having a specific pay and employment equity role within the Ministry of Education to provide a gender lens. This role could encompass the promotion, development and monitoring of PAEE policies and programmes in the education sector. [Ministry of Education, by June 2009].

(c)   Provide access to expert advisory service on employment equity issues to:

(i)   participate in, attend or advise boards appointing a principal

(ii)   provide employment equity training for boards of trustees prior to appointing a principal

(iii)   provide free expertise if required

(iv)   ensure boards of trustees know how to access expertise

[Ministry of Education after discussion with tripartite group members[2]].

Note: one way of enacting recommendation (c) (i) could be through a government appointee as in some jurisdictions outside New Zealand this has appeared to make a difference to addressing employment equity issues in relation to the appointment of principals. However, in New Zealand such provision would be outside the current self managing governance model of boards of trustees. Any such possible change would therefore require extensive consultation with the sector, as well as Government support through policy and legislative change.

(d)   Provide employment equity training for principals in relation to appointment processes for staff. [NZSTA, unions ongoing].

(e)   Include gender equity in NZSTA / union employment education courses. [NZSTA / unions, commencing 2009].

(f)   Monitor pay and employment equity policies and processes in schools to determine the extent to which gender equity issues are being addressed, including appointment processes relating to the progression of women teachers through management positions to principalships. [Ministry of Education, 2009].

(g)   Design career related professional development specifically for women e.g. within programmes such as Aspiring Principals and Kiwi Leadership. [Ministry of Education by December 2008].

(h)   Support the establishment of a mentoring programme for women aspiring to careers in management in schools. [By Ministry of Education / NZSTA / unions, by June 2009].

(i)   Develop resources to encourage and assist employers to consider appointing part-time teachers to positions of responsibility. [NZSTA in consultation with unions commencing October 2008].

Issue 7:   Teachers – inequitable provision of classroom release time or non-contact time for part-time teachers

Recommended actions, by whom and timeframe:

(a)   Refer equitable provision of classroom release time or non contact time with full time teachers for part-time teachers to the next bargaining rounds for teachers in each sector. [Parties to the collective agreements].

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[2] Note that the tripartite group parties could not reach an agreed statement on how the discussion would be undertaken by the Ministry prior to the Ministry making a decision on progressing recommendations (c) (i) – (iv)

1.2.5   *Contractual Entitlement / Legal basis for issues*

Other priority gender equity issues that are related to contractual entitlements or have a legal matter underpinning the concern are:

Issue 8:   Support staff – the ineligibility for annualised pay experienced by fixed term employees

Recommended actions, by whom and timeframe:

(a)   Refer the extension of annualisation to fixed term employees who are employed for the school year or longer to the next bargaining round. [Parties to the collective agreement in 2009].

(b)   Investigate means of extending the principles of annualisation to all employees employed for less than the school year. [Parties to the collective agreement at a future bargaining round].

Issue 9:   Support staff – effect of break in employment on service entitlements

Recommended actions, by whom and timeframe:

(a)   Refer equitable service entitlements for support staff with respect to effects of breaks in employment to the next bargaining round. [Parties to the collective agreement, 2009].

Issue 10:   Support staff – effect of absence for child care on service entitlements

Recommended actions, by whom and timeframe:

(a)   Refer equitable service entitlements for support staff with respect to effects of absence for child care to the next bargaining round. [Parties to the collective agreement, 2009]

Issue 11:   Support staff – lack of clarity about work expectations and whether that work is paid

Recommended actions, by whom and timeframe:

(a)   Encourage employers to ensure support staff job descriptions are clear and comprehensive and that the expectations on support staff employees are clearly communicated. [NZSTA / NZEI Te Riu Roa, commencing September 2008].

(b)   Provide clear and transparent guidelines from employers to employees about activities that fall within paid work time by employers. [NZSTA in consultation with NZEI Te Riu Roa commencing September 2008].

Issue 12: Support staff and teachers – domestic and sick leave provisions

Recommended actions, by whom and timeframe:

(a)   Investigate means of providing fair sick and domestic leave provisions for support staff and teachers and refer to the next bargaining rounds. [Parties to the collective agreements by 2010].

(b)   Consider discrete domestic leave provisions for support staff and teachers as part of the above investigation. [Parties to the collective agreements by 2010].

1.2.6   *School policies and practices basis for issues*

Priority gender equity issues that are related to policies and practices in the employment environment are:

Issue 13:   Support staff – lack of access to professional development for some employees

Recommended actions, by whom and timeframe:

(a)   Increase awareness of employers about professional development options available to support staff. [NZSTA, ongoing].

(b)   Encourage tertiary providers to offer courses and programmes that are relevant and accessible to support staff, and where possible these courses and programmes should lead to qualifications. [Unions, NZSTA and Ministry of Education, ongoing].

(c)   Encourage support staff to inquire about professional development needs. [PSA / SFWU / NZEI Te Riu Roa, by May 2009].

(d)   Recommend school employers link performance management with professional development needs. [NZSTA, ongoing].

(e)   Encourage boards of trustees to consider the needs of all support staff when setting their professional development budget. [NZSTA, ongoing].

(f)   Refer the issue existing in the Caretakers and Cleaners (including Canteen Workers) Collective Agreement between payment available for service or for qualification but not both to the next bargaining round. [Parties to the collective agreement].

(g)   Explore ways that support staff can access funding for professional development. [Ministry of Education/NZSTA, ongoing].

Issue 14:   Support staff – lack of ability to contribute influence and advice

Recommended actions, by whom and timeframe:

(a)   Disseminate good practice examples to employers of how to encourage and support contributions from support staff. [Ministry of Education and NZSTA, commencing September 2008].

(b)   Empower support staff members to participate in school communities. [unions, ongoing].

(c)   Promote inclusion of support staff in developing relevant policies and practices and informing decision-making within the school. [Ministry of Education / unions / NZSTA, commencing September 2008].

(d)   Increase visibility of support staff in documents and material produced e.g. communications and policies. [Ministry of Education / unions / NZSTA, ongoing].

Issue 15: Women teachers – lack of ability to contribute influence and advice

Recommended actions, by whom and timeframe:

(a) Develop and disseminate joint guidelines on inclusive policies and employee engagement surveys and encourage and assist their use in schools to enable staff to fully participate. [NZSTA and unions in 2009].

(b) Include guidelines in management training and courses for new principals. [Ministry of Education, NZSTA and Unions 2009].

Issue 16: Support staff – lack of clear job descriptions and performance management processes for some employees

Recommended actions, by whom and timeframe:

(a) Explore why the current guidelines are not leading to greater improvements and adjust advice if required. [NZSTA and NZEI Te Riu Roa, by December 2008].

(b) Use the automatic alert generated by the payroll system that reminds schools that incremental steps are due (refer issue 1 above) to also prompt schools about the need for a performance appraisal. [Ministry of Education, for implementation in 2009].

(c) Provide information to employers regarding what should be supplied to new staff as part of their induction. [NZSTA, ongoing].

Issue 17: Support staff and teachers – bullying, harassment and discrimination

Recommended actions, by whom and timeframe:

(a) Promote the use of surveys in schools and for the survey to include questions about prevention of bullying, harassment and discrimination. [NZSTA, 2009].

(b) Develop and disseminate guidelines and examples of surveys to boards of trustees for principals and staff. [NZSTA/unions, 2009].

(c) Include or provide guidelines and resources in management training and first time principals' courses. [NZSTA/Unions 2009].

(d) Provide best practice guidelines and resources regarding work-place bullying and student behaviour. [NZSTA/Unions 2009].

1.2.7 *Recommendations for future years:*

The steering group recommends that:

(a) A monitoring group representing the Tripartite Steering Group membership be established and be tasked with:

- monitoring the implementation of the response plan and its recommended strategies

- improving central data collection on characteristics and employment conditions that affect support staff in schools, and

- keeping the Department of Labour PaEE unit informed about progress of the response plan.

(b) A further national pay and employment equity review is conducted in three to five years to analyse PaEE in the compulsory school sector including progress on the implementation of this response plan and its recommended strategies.

(c) Further research be conducted:

- into the status of women in support staff positions, and

- on impacts of leave provisions on support staff and teachers.

2.0 Introduction

2.1 Context

2.1.1 The Government developed a five-year Pay and Employment Equity (PaEE) Plan of Action. The outcome sought is that remuneration, job choice and job opportunities in the public sector, public health and public education sectors are not affected by gender.

2.1.2 The first phase of the Plan of Action involved setting up and planning pay and employment equity reviews in the public service, public health and public education sectors.

2.1.3 The Ministry of Education took the lead role in the PaEE reviews in kindergarten associations and the compulsory schooling sector, and a coordination and support role for reviews in the tertiary sector. Alongside these reviews the Ministry of Education has completed a PaEE review of its own staff.

2.1.4 The review in the compulsory schooling sector was undertaken as a partnership between the Ministry of Education, the New Zealand School Trustees Association (NZSTA), and education sector unions – New Zealand Educational Institute (NZEI Te Riu Roa), New Zealand Post Primary Teachers' Association (PPTA), Service and Food Workers Union (SFWU) and the Public Service Association (PSA).

2.1.5 The sector contains approximately 2,500 self managing schools that are autonomous Crown entities with their own unique culture, policies and practices. They exist in a range of settings from small isolated rural regions to large urban settings and have from as few as two employees to over 200 employees.

2.1.6 Employees included in this review (teachers, principals and support staff) are those employed by boards of trustees in state and integrated primary, secondary, composite[3] and special schools. In April 2008 ministry payroll data showed there were approximately 51,000 teachers and principals and upwards of 28,000 support staff in these schools. More detailed demographic information is included in Appendix 6.3.

2.1.7 For the purposes of this review the term 'support staff' refers to all staff directly employed by schools who are not teachers, including executive / clerical, caretakers, groundstaff, cleaning, nursing, technical and trade staff, teaching assistants, therapists, cafeteria and hostel staff, and special education assistants.

2.1.8 Employment conditions including pay rates in the compulsory schooling sector are unique as bargaining is conducted centrally by the Ministry of Education under delegation in the State Sector Act 1988, not by boards of trustees (the 'employers' in schools). Boards of trustees, through delegation to principals, have responsibility for the day to day school employment matters. Pay rates are set in national collective agreements. Most teacher salaries are funded centrally, while support staff costs are met by the schools through their operational funding according to minimum rates set in collective agreements. The Ministry of Education, in consultation with representatives of the employers (NZSTA) negotiates the appropriate collective agreement with the relevant union who represents the employees. Individual employment agreements are subsequently promulgated for non-union employees by the Ministry of Education.

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[3] Composite schools include area schools covered by the Area School Teachers' Collective Agreement, and special schools include residential schools.

2.2   Purpose and objectives of project

2.2.1   The purpose of the project was to investigate if gender affects pay and employment equity within the compulsory schooling sector, to explore areas that are already performing well, and to examine where gender differences in pay and employment terms and conditions may require a remedial response.

2.2.2   The review was based on the principle that women and men should have equitable opportunities to participate in all areas of the school, receive an equitable share of rewards, and to be treated with respect and fairness.

2.2.3   The objectives were to:
- assess whether women and men in the compulsory schooling sector receive an equitable share of rewards, participate equitably in all areas of the school, and are treated with respect and fairness
- identify differences in rewards and work experiences for men and women, and any barriers existing for female dominated groups
- assess whether any gendered differences were explainable and justifiable, and
- develop and prioritise recommendations to address non-justifiable gender equity issues affecting woman in the schooling sector.

2.3   Project participation

2.3.1   The Compulsory Schooling Sector review was initiated by the Secretary for Education in 2005 who invited participation in a Tripartite Steering Group to oversee the review.

2.3.2   The Tripartite Steering Group included representatives from the Ministry of Education, NZSTA, NZEI Te Riu Roa, PPTA, PSA and SFWU.

2.3.3   The Tripartite Steering Group developed terms of reference and principles for the review to guide its work. The terms of reference included the role of the steering group and scope of its work (see Appendix 6.1).

2.3.4   Review work in individual schools was undertaken through a bipartite approach with employers (principal and/or board of trustees) and employees. The review process involved voluntary participation by nine schools that formed their own bipartite school review committees to collect and collate data and information from staff within their school. These schools consisted of six primary, one area and two secondary schools. The committees included employer representation (principal and/or board of trustee member) and employee representation (teachers and support staff members). Union members were given the opportunity to determine who would represent their respective groups on the school review committee. The Department of Labour, in conjunction with the project coordinators, provided training for the school review committees.

2.3.5   Employees in four other schools (one residential school and three secondary schools) participated in the initial Staff Experience Survey (referred to as the 'first survey', see Appendix 6.4). This brought the total number of responses to 483 (341 women, 142

men), with an approximate overall response rate of 47 percent. Of these responses, 47 percent were from the primary sector and 53 percent were from the secondary sector.

2.3.6 Employees in a range of other schools were included by means of focus groups held in two regions (Manawatu and Wellington) for support staff, teachers, and principals. Numbers attending focus groups were: 20 support staff (19 women, one man), 14 teachers (11 women, three men), and 50 principals (25 women, 25 men).

2.3.7 A Supplementary Online Perception Survey (referred to as the 'second survey', see Appendix 6.5) was also conducted in 2008 across a representative selection of 120 schools across the county, with 572 responses received (413 women, 159 men) with an overall approximate response rate of eight percent. Of the responses, 24 percent were from primary and special schools and 76 percent were from secondary and composite schools.

2.3.8 A full time project coordinator was appointed by the Ministry of Education for one year from June 2007 to facilitate the remainder of the review work. The role of the project coordinator included:
- working with the steering group to develop the scope, design and processes for the school sector pay and employment equity review process
- coordinating the selection of schools
- supporting the establishment and training of the school review committees
- supporting the steering group in overseeing the project; facilitating a smaller group which was formed to analyse data, identify gender equity issues and draft responses, and
- working with the steering group on the review report and response plan.

2.3.9 A union coordinator was appointed for four months in 2007 and a NZSTA Coordinator worked on a part-time basis towards the end of 2007 to facilitate the training and support the work of school review committees within the participating schools.

2.4 Methodology

2.4.1 Process

(a) The Department of Labour's Pay and Employment Equity Unit provided a workbook outlining a proposed approach, training, ongoing involvement and support for the steering group and project coordinators.

(b) The schooling sector review process was based on the Department of Labour's recommended six step process and was modified for use in the schooling sector. The steps were:

1 decide on important gender issues to investigate with respect to equitable rewards, participation, and respect and fairness
2 undertake preliminary analysis of key questions based on nationally held pay data for teachers and support staff
3 carry out follow-up analysis of key questions
4 validate provisional findings through reviews in participating schools and surveys
5 prepare a review report, and

6   develop recommended response strategies in a response plan.

(c)   The steering group selected a variety of schools and invited them to participate in the review. In the participating schools review committees promoted the first survey, collected relevant pay and employment data for collation by the steering group; and conducted in-school discussions or surveys to respond to a number of questions under each of the three key gender equity questions.

(d)   A communication strategy for the sector was developed by the steering group in conjunction with the communications staff at the Ministry of Education. The strategy included developing a dedicated web page to provide information to the sector; mailing an information kit to all state and integrated schools; sending a newsletter to committee members in participating schools; and developing articles for publication in the Education Gazette. The latter were for use by the tripartite organisations to inform Ministry of Education staff, principals, boards of trustees and school employees about the review progress.

2.4.2   Data Sources

(a)   Pay and pay-related information was gathered at the national level from the Ministry of Education data for teaching and support staff. This data was comprehensive for teaching staff from all state and integrated schools in New Zealand. Approximately 90 percent of data was complete for support staff in those schools (some schools opt to pay their support staff directly rather than through the central payroll system). Further detailed information about pay related rewards was collected from within the participating schools.

(b)   Employee perceptions and experiences were gathered through:
- a perception survey available to all employees in the participating schools
- information sent in by school review committees in the participating schools
- focus group discussions held for groups of principals, teachers, and support staff
- a survey for principals, and
- a second online perception survey for all employees in a further 120 schools.

(c)   Other sources of information used are listed in Appendix 6.7. These provided information on employment equity, and in particular, on women teachers and principal's advancement.

(d)   The first survey was available on-line and in hard copy. School review committees in participating schools encouraged their colleagues to complete the questionnaire. Principals from outside the participating schools who attended the focus groups also promoted the first survey in their schools. As a result a number of teachers and support staff beyond the participating schools provided further information.

(e)   Approximately 500 responses to the first survey were received (70 percent from teachers and 30 percent from support staff). The response rate from staff across the participating schools was 47 percent with those in individual schools varying from six percent to 100 percent. Whilst there was a high response rate, the limited number of schools involved in the survey meant that caution had to be used when generalising results. The steering group considered differences of ten percentage points or more to be of note in responses to equity questions and wherever possible used other sources of information to verify issues that were identified through this source.

(f)   Focus group discussions were held with groups of principals, teachers and support staff who were attending union meetings in Wellington, and with groups of principals in two regions – Manawatu and Wellington.

(g)   Information relating to principals in their role as employees of boards was gathered through the first survey (for participating schools); through focus groups and a written survey for principals in two regions. Focus group questions related to principals' experiences of initial appointment to the principal role, employer support and career advancement. The survey asked for more detail about their career pathway. A total of 50 principals (37 primary and 13 secondary) attended focus groups, and 38 principal survey responses were received.

(h)   A second survey was sent to all employees in 120 schools via the schools' union delegates to gain further information in areas where other sources yielded little data, and to gain thoughts and perceptions from staff from a wider selection of schools across New Zealand. Approximately 600 responses were received, 80 percent from teachers and 20 percent from support staff. The low level of responses for school types other than secondary and, in particular, the small number of men responding in these schools meant that gender comparisons could only reliably be made for secondary teachers. As with the first survey, differences of ten percentage points or more were considered to be of note.

(i)   Responses by school type to the second survey were:
   ▪   primary (21 percent)
   ▪   secondary (68 percent)
   ▪   composite (seven percent), and
   ▪   special schools (three percent).

2.4.3   Data Analysis

(a)   The Demographic and Statistical Analysis Unit of the Ministry of Education provided demographic and pay-related data about the teaching workforce analysed from payroll records. This was completed early in the review and initially focused on long term trends in the teaching workforce, with data going back 35 years. This long term analysis identified a number of persistent inequities.

(b)   The detailed analysis divided teachers into non-management, middle management and senior management on the basis of the number of permanent

units[4] teachers held. For the purposes of this report those with no permanent units were regarded as non-management, middle management were those with one to three permanent units and senior management had four or more permanent units. These definitions were developed to ensure comparability between schools due to the differences in the position titles that schools use. Principals were identified separately.

(c)   Support staff (non-teaching workforce) data was also provided from the Ministry of Education 2008 payroll data. Data used from this source only enabled the analysis of information about broadly aggregated occupational groups, rather than individual occupational groups which had been the preferred approach of the steering group. The steering group identified administration, teacher aides and cleaners as the groups of interest for further analysis. These groups were chosen because they represented large numbers of support staff and were female dominated. Administration staff were subsequently divided into three sub-groups – executive / clerical, school secretaries and secretarial / typing.

(d)   Participating schools were asked to provide additional pay-related information intended to supplement that held at national level, and to provide more detailed information about individual occupations, particularly for support staff in those schools.

(e)   The steering group formed a smaller working group early in 2008 which had responsibility for analysing the data and presenting findings and recommendations to the steering group.

2.4.4   Challenges encountered during the review

(a)   The challenge for the steering group was to gain a picture of pay and employment equity existing for school sector employees across 2500 individual organisations. Most reviews to date had been conducted within one organisation with one employer. Determining and reaching agreement on a practicable review process for the whole of the compulsory schooling sector took considerable time and discussion.

(b)   In addition to examining nationally held data, the steering group was charged with obtaining information about employees' views and experiences of their employment in particular to answer review questions on participation and respect and fairness. Three main options to achieve this were considered. These were not mutually exclusive and included:
   ▪   a national survey of all employees in schools
   ▪   a series of focus groups across the county, and
   ▪   selecting and inviting individual schools to participate in a review of their organisation.

(c)   The steering group adopted a modified version of all three options whereby selected schools in two regions were invited to participate in individual school reviews; focus groups and surveys were conducted for support staff, teachers

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[4] Can also be referred to informally, especially in the secondary sector, as management units.

and principals within those regions; and staff in participating schools were invited to respond to the first survey. A second survey was later sent to employees in a further 120 schools across the county to broaden the scope of responses and validate earlier findings.

(d)   Unlike other reviews, which were mandated for individual organisations in the public service, and to some extent in the health sector, schools were not required to participate and many declined the invitation to take part in the in-school review process. Reasons for declining included:
- demands on their time;
- beliefs that expectations on schools were too high; and
- many of the schools were small organisations that experienced difficulties releasing staff from duties in the course of a school day or with funding that release.

Those concerns were only partly mitigated by offering schools a monetary contribution towards the relief costs for staff to attend training and other meetings required of participating schools.

(e)   Review work in schools occurred in the last term of a school year. As a result some schools which had initially agreed to participate were only able to complete some of the process asked of them or needed to withdraw. The intended number of participating schools was twenty, this was reduced to twelve, and of these three only completed the first survey.

(f)   Additional challenges included getting the employer's voice and clarifying the role of the principal. Principals have two distinct roles – one as an employee of the board of trustees and one as an employer representative. In the review process, the principals often represented the board of trustees on the bipartite school review committee (refer 2.3.4). However, in focus groups and when invited to comment on findings with school review committees reports, the principals responded as employees.

(g)   Residential special schools were a specific group of schools that the steering group was interested in analysing. However, it has not been possible to report on residential schools separately due to the small number of schools (six) involved. In order to support anonymity of responses, results from residential special schools were combined under the broader category of special schools.

2.4.5   Determining whether an issue was a gender equity issue which required response

(a)   Where clear gender differences were observed in employees' pay or employment experience, the steering group considered whether those differences disadvantaged women, whether they were in part, or fully, attributable to gender and whether the explanations for the differences were justifiable. If they were not justifiable the issue was regarded as a gender equity issue and the steering group developed a range of response strategies to address the issue.

(b)   For female dominated occupations, gender comparisons were difficult to make. In these cases, comparisons of contractual employment conditions and

experiences with other public sector or education groups provided assistance. The steering group considered whether any differences that disadvantaged women or significant issues for the occupational group warranted further investigation or remedial response.

3.0 Key Questions and Findings

3.1 Rewards

The questions related to rewards that were considered in the review are listed below:

Are the rates of base pay for women and men affected by gender?
Full time equivalent salaries.

Do women and men have equitable shares of rewards other than base pay?
Recruitment, retention and responsibility payments, non-contact time, allocations of classes and students, retirement provisions.

Do women and men advance at the same or similar rates to higher levels and pay?
Level of management – measured through allocation of units, length of service prior to promotion to senior management, principal, higher paying principal positions, progression rate through support staff scales.

*Are women and men appropriately represented at senior levels in the organisation?*
Gender differences between those holding associate principal / deputy principal / principal / senior support staff positions compared with gender of each workforce.

3.1.1 TEACHERS - findings related to rewards

Rates of pay

(a) There is little difference in teachers' base scale salaries by gender as pay is determined through a national collective agreement. This specifies the criteria for base pay by placement on a 14 step salary scale. Entry and maximum points are determined by qualifications and length of teaching service. Teachers progress annually through specified steps, subject to attestation and to the applicable maximum on the scale.

(b) There are no significant gender differences in salaries (made up of base scale salary[5], units and Recruitment, Retention and Responsibility payments/3R payments) for teachers. Analysis of both medians and means showed that differences between salaries of men and women were less than five percent.

Median salaries (comprising of base scale salary, units and 3R payments) of teachers by occupational group[6] and gender, 2006
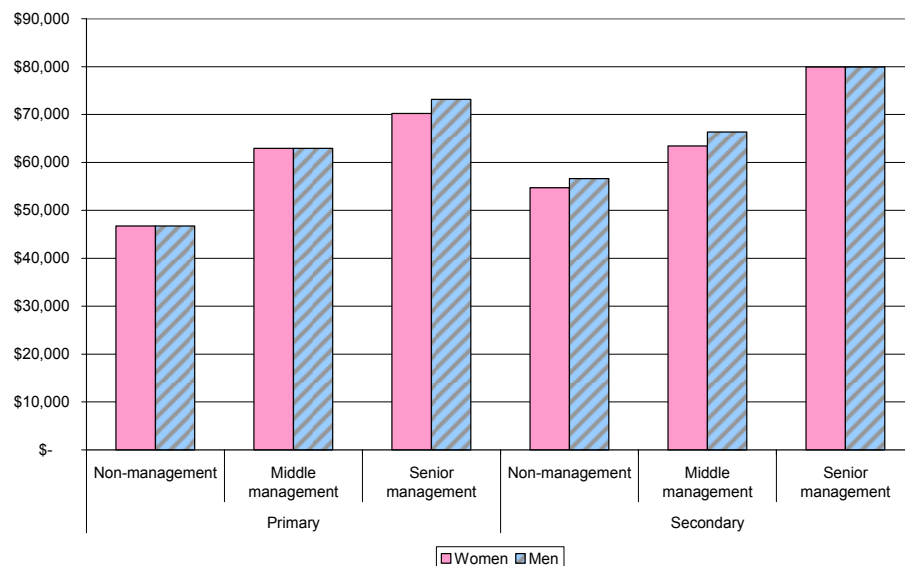
(c) Results from the first survey indicate teachers perceive that men and women are paid equally for doing similar work in the school (94 percent agreed).

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[5] Base scale salaries are the pay rates as defined in clauses 3.1.8 of the Primary Teachers' Collective Agreement, 4.1.1 of the Secondary Teachers' Collective Agreement and 3.1.1 of the Area School Teachers' Collective Agreement

[6] Teachers have been divided into management and non-management according to whether they hold permanent units. Teachers who do not hold permanent units are classified as non-management. Teachers who hold between one and three permanent units are classified as middle management. Teachers who hold more than three permanent units are classified as senior management.

Other rewards

Monetary rewards

(d)   In addition to base scale salary, units, and 3R payments, teachers may receive a range of other rewards. These include monetary rewards such as Middle Management Allowances (MMAs), Senior Management Allowances (SMAs), and specific allowances for working with beginning teachers, acting up, working in a hard-to-staff school and other roles. The steering group did not examine the allocation of these monetary rewards in the course of this review, however, it did focus on the allocation of units, where considerable gender inequities were evident.

Other rewards

(e)   Other rewards considered were classroom release time (primary), non-contact time (secondary), allocation of desirable class groupings or students, payment of professional association fees, study fees, time off for study, allocation of study awards and sabbatical leave. The following paragraphs outline the steering group's findings.

(f)   The steering group's examination of the allocation of classroom release time (primary teachers) or non-contact time (secondary teachers) revealed that teachers perceived allocations to be equitable between men and women who worked full-time but around a third of respondents perceived part-timers were disadvantaged compared to full time staff.

(g)   This perception of inequity for part-time teachers is evidenced by the teacher collective agreements which provide a pro-rata entitlement for classroom release time for primary teachers working 0.8 and above only; and non-contact time for secondary teachers working 0.72 and above only. Schools can provide non-contact time / classroom release time in addition to this from school funds. In the current Secondary Teachers' Collective Agreement, it was agreed schools would endeavour to provide non-contact time for part-time teachers employed between 0.48 and 0.89 full-time equivalents that is proportionate to that provide to full-time teachers.

> *As part-time teachers in all school sectors have a high proportion of women, the steering group found that entitlements of classroom release time or non-contact time for part-time teachers was a gender equity issue that warranted response. Refer Issue 7, page 68.*

(h)   Allocations of desirable class groupings, smaller sized classes or particular students; professional association fees, study fees, and time off for study were all thought to be equitable for men and women by over 85 percent of teachers responding to the surveys. Where there were differences, men tended to think women were rewarded more highly, and women thought men were more highly rewarded.

(i)   A gender analysis of those receiving nationally available study awards showed few barriers existing for women in most categories. However it was found that the situation was different for sabbatical leave. The secondary teacher sabbatical leave scheme is heavily subscribed by men (71 percent) compared with 29 percent women on average over the last three years. The entry criteria of at least 20 years service with at least seven years unbroken service is thought to be the reason for fewer women applying and qualifying for sabbatical leave. The review group noted that a positive change for gender equity had been made to the entry criteria in 2007 by parties managing the awards to allow a longer break for child care (now four years) before service was considered to be broken. However, this does not appear to have impacted on the gender balance of secondary sabbatical leave recipients in the 2008 year. The steering group noted that analysis of participation by gender in the sabbatical leave scheme should be monitored in any future pay and employment equity reviews.

**Advancement and representation at senior levels of the organisation**

(j)   Analysis of payroll data found that women teachers do not advance at the same rate as men in the compulsory schooling sector. Women are therefore disadvantaged with respect to career advancement with consequential effects on monetary and other rewards. The analysis showed that:
- women are less likely to hold senior management roles; and are less likely to hold middle management roles in secondary and composite schools
- when women hold units, they generally tend to hold fewer units than men, and
- women's career advancement occurs more slowly than for men.

Percentage of teachers in middle and senior management positions, 2006
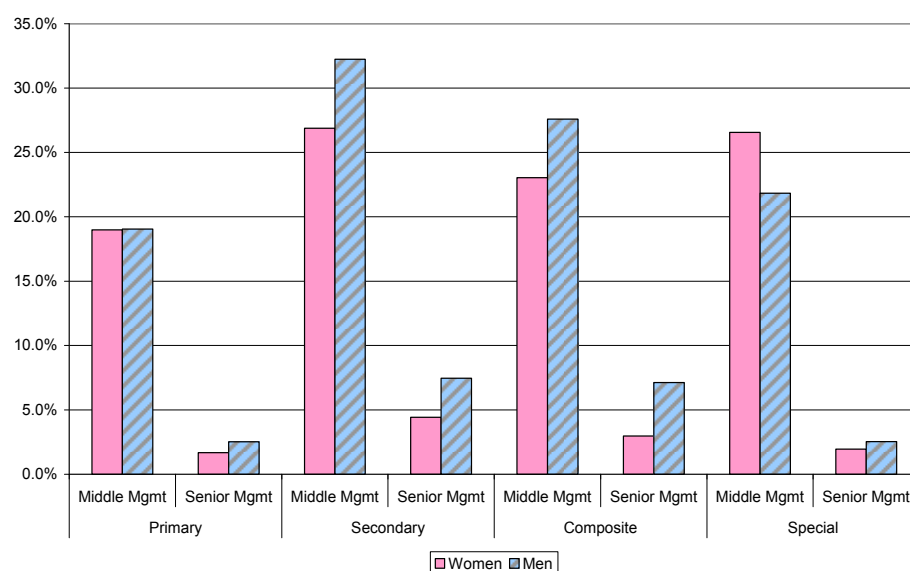
(k)   The graph above shows that across all school types, women are less likely than men to hold senior management positions. This is particularly marked in secondary and composite schools, where women are also much less likely to hold middle management positions.

(l)   Where women did hold units they were likely to hold fewer units than men. This pattern is shown for primary and secondary schools in the graph below but also holds true for composite and special schools (graph below).

Percentage of teachers who hold units by the number of units held, 2006
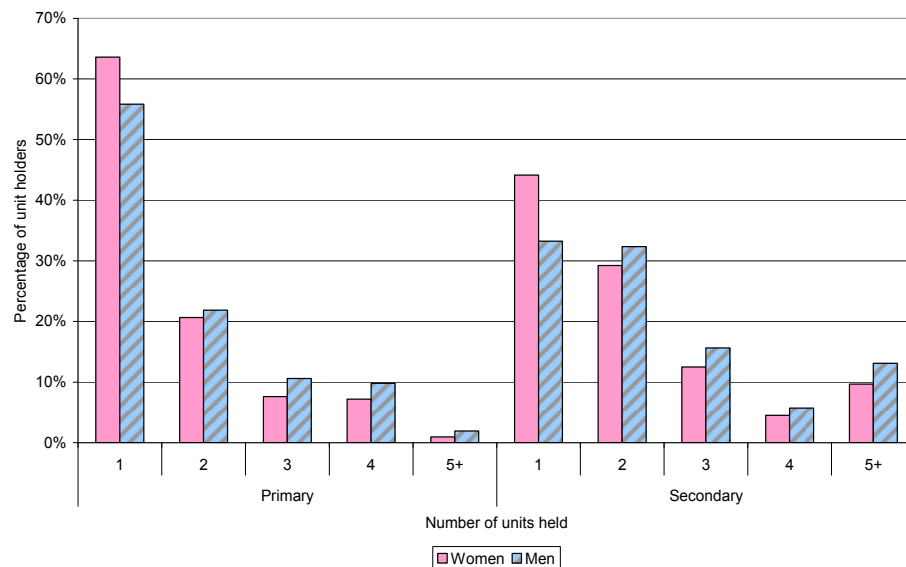
(m)   The steering group also considered whether the lower rates of advancement for women were a consequence of other factors such as years of experience or qualifications. Analysis, controlling for the factors of years of experience and qualifications, showed that women were still less likely to advance than men and this advancement was likely to be slower than for men.

> *The steering group found that lower rates of advancement for women teachers was a gender equity issue that warranted response. Refer Issue 6, page 66.*

(n)   Results from the first survey indicate women and men have similar levels of interest in their advancement, confidence about prospects for their advancement (77 percent) and agreement that their applications would be treated fairly (88 percent agreed). However, fewer agreed (73 percent) that the chances for promotion for men and women were equal in the school.

(o)   In the primary sector, of those who thought promotion chances were not equal, male teachers tended to regard women's chances as higher and women regarded men's chances as higher.

(p)   Responses from secondary staff showed a third of teachers thought promotional chances were not equal for men and women, and nearly a fifth of men and women thought men's chances of promotion were higher. These perceptions reflected the pay data showing inequitable advancement for men and women in the secondary sector.

(q)   The following barriers to career advancement were suggested by several school review committees and by teachers attending focus groups:
- time taken out for child rearing and family responsibilities by many women, and
- the difficulty for women in managing a work-life balance when taking on increased responsibilities.

(r)   Other barriers to career advancement for women noted by teachers in focus groups were that perceptions existing in schools and in the wider society can affect the impartiality of appointment processes. They gave examples including:
- the perception that women are less likely to perform as well as men due to the priority they give to the family
- the perception that its better to have men in management for their management style, and
- the perception that men provide positive role models for boys.

Advancement of part-time teachers

(s)   The first survey questions explored people's experience and perceptions about their ability to work part-time and advance their careers. Responses from those working part-time indicate that women are less likely than men to see part-time work as a barrier to advancement.

(t)   There were, however, high percentages of staff responding to the second survey who felt part-timers were disadvantaged and that gender differences were found in the areas of unit allocation and advancement. In both areas women were more likely than men to consider part-time staff disadvantaged:
- 64 percent of women felt that part-time staff were disadvantaged in the allocation of units, in comparison to 53 percent of men, and
- 71 percent of women felt part-time staff were disadvantaged in regards to advancement or promotion, compared to 61 percent of men.

(u)   When asked if teachers thought they could hold a management position and work part-time, 64 percent of all teaching staff did not believe that this was possible. Primary teachers in particular were less positive about their ability to work part time and hold a management postion. One school review report noted that no part-time staff hold units and that this was an equity issue.

> *The steering group found that barriers to advancement for part-time teachers formed part of the gender equity issue about women teachers' career advancement that warranted response. Refer Issue 6, page 60.*

Advancement from teacher to principal positions

(v)   Women are under-represented as principals across all school types. The graph below shows the percentage of the teaching workforce that are principals. For example only four percent of women teachers in primary schools are principals compared to 24 percent of men teachers.

Percentage of teaching workforce who are principals, 2006
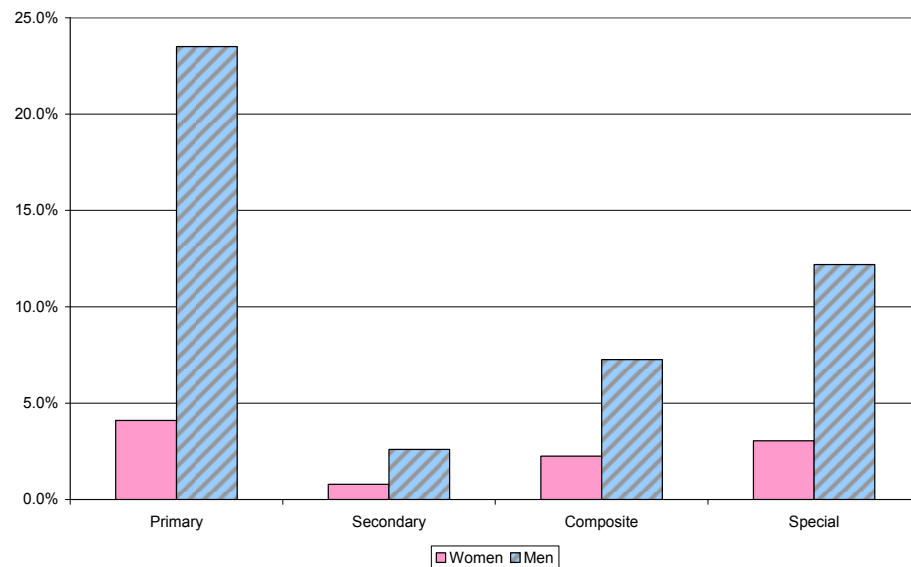
(w)   The graph shows men teaching in primary schools are more than five times more likely to be principals than women. In secondary and composite schools men are more than three times more likely to be principals than women. In special schools men are four times more likely to be principals than women.

(x)   Whilst these differences are significant, they have shown a steady, albeit slow, improvement over time. Statistics for primary and secondary schools show that in 1992 men teaching in primary schools were eight times more likely to be principals than women. In the secondary sector, men were close to four times more likely to be principals than women. While the gap is closing, it is at a slow rate.

(y)   The above discussion and analysis has focused on principals as a proportion of the teaching workforce, an alternative way of looking at gender equity is to consider the proportion of principals that are women and how this compares to the overall teaching workforce. Both methods highlight the extent to which women are under-represented in the principal workforce. The following analysis shows the proportion of women principals compared to the proportion of women teachers.

(z)   Less than half (43 percent) of the total principal workforce are women even though women make up 72 percent of the overall teaching workforce. Similar patterns of inequity exist across all sectors as shown in the graph following.

Gender breakdown of the teaching workforce and principal workforce, 2006
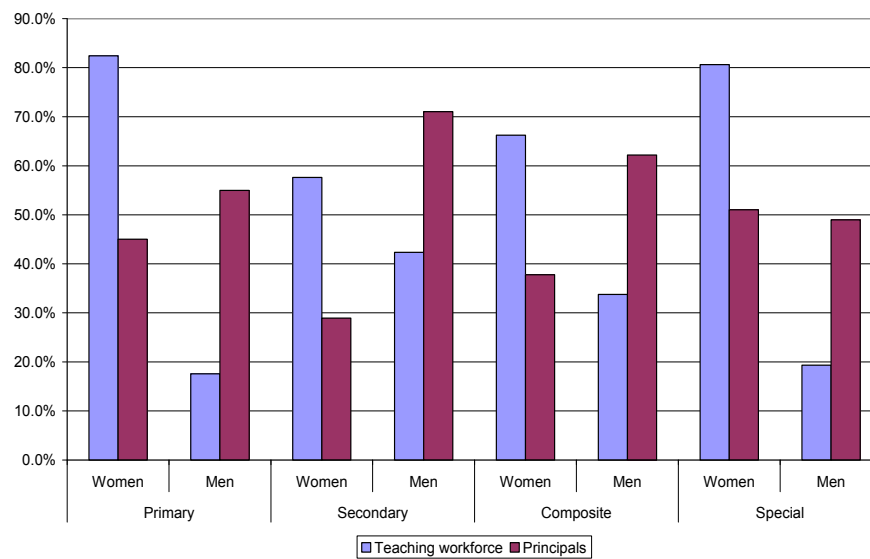
(aa) Based on 2006 data:
- the primary teacher workforce is 82 percent women whereas the primary principal workforce is 45 percent women
- the secondary teacher workforce is 58 percent women whereas the secondary principal workforce is 29 percent women
- in composite schools the teacher workforce is 67 percent women, whereas the composite principal workforce is 38 percent women, and
- in special schools (including residential schools) the workforce is 81 percent women and the principal workforce is 51 percent women.

(ab) In focus groups principals suggested that major barriers for women advancing to first time and subsequent principal positions were: time taken out for child rearing and family responsibilities; and some principal appointment panels perceiving males to be more effective principals than women.

(ac) Other barriers suggested for career advancement of both women and men principals were: lack of opportunity, lack of career information and lack of knowledge relating to recruitment and selection processes. Work on progressing Principals' Wellbeing / Hauroa[7] and the project examining professional supervision for principals[8] may have positive effects on addressing some of the barriers, especially support work-life balance for principals (work life balance for principals is reported on in part 3.3). The steering group has recommended actions to do more to assist in addressing the gender imbalance of women and men with regards to career advancement, and therefore do more to address the gender pay gap existing in the compulsory school teaching profession.

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[7] Principals Wellbeing\Hauora Forum is the work promoted by the NZPF and arises from an annual forum where a number of the key stakeholders from the sector (NZEI, MoE, Teacher Council, CEO, NZSTA) participate in identifying strategies to address this issue.
[8] Outcomes of the 2007 settlements of the Primary Principals' Collective Agreement and the Secondary Principals' Collective Agreement.

(ad)   Research indicates that women do not apply for principals positions for a range of work-life balance reasons (Brooking, 2003). A consequence to the sector of women applying, or not being appointed to principal positions, as Livingston (cited in Brooking, 2003) suggests, is that 'there is a very large pool of well qualified and experienced women who may be hitting a glass ceiling'.

(ae)   Keren Brooking has released a number of other research papers that argue for possible reasons and barriers that may lead to the gender imbalance in New Zealand. These include:
- lack of "mandatory credentialing" required prior to becoming a principal (Brooking 2006)
- boards' preference for appointing a male unless there was some exceptional or historical reason for not doing so (Brooking, 2006)
- discrimination against single women (Brooking, 2006)
- discrimination on basis of gender compounded by age discrimination (Brooking, 2005)
- a gendered construct of the importance of male leadership in keeping discipline (Brooking, 2003)
- the self managing structure reforms of New Zealand schools under the Education Act 1989 have not contributed to any significant improvement in the inequitable gender representation of principalship (Brooking, 2003, 2008)
- "lack of an official representation from [local] government to sit on appointment panels in a monitoring capacity" (page 43 Brooking 2008)
- "media provoked moral panic around 'feminised schooling' and 'failing boys' discourses (Lingard, 2006) produced appointment decisions based on role models for boys" (Smith, 1999) (both in Brooking 2006).

(af)   A 2003 joint report[9] by NZSTA, Ministry of Education and NZEI Te Riu Roa found that appointment processes generally operate well. However, the report did not focus on gender pay and employment equity, and whilst agreement was reached to promulgate good practice processes for principal appointments there was limited focus on any equity factors in the processes.   The steering group noted further work to include gender equitable practices in principal appointment processes would be desirable.

(ag)   The steering group noted that section 77D of the State Sector Act, 1988 requires that the Chief Executive of the Ministry of Education "shall be responsible for promoting, developing and monitoring equal employment opportunities (EEO) policies and programmes in the education service". The steering group considered that whilst this review has focused on PaEE this does form part of EEO and therefore monitoring of outcomes from PaEE perspective should be recognised as such. This may necessitate the Ministry of Education providing guidance to boards of trustees on what steps boards of trustees could undertaken to address PaEE matters and identifying a means of monitoring.

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[9] NZEI Te Riu Roa , NZSTA and Ministry of Education. (2003). Report to the Minister of Education of the 2003 Working Party on Primary Principals' Appointments. Wellington.

(ah)   In a recent presentation, Wylie (2008) examined career patterns of principals in comparison to the previous survey in 2003, and indicated that while twice as many were expecting to remain at their school, of those intending to leave their school, almost a quarter were looking at retirement and twice as many were looking at a different career. Wylie cautioned that "we are looking at what may be a greater loss from the role in the next five years than we have experienced in the past five years". The steering group recognised that while this may provide increased opportunities for new principals including female principals, more research and a greater understanding for planning was required.

> *The steering group considered career advancement for women to principal positions was a gender equity issue that warranted response. Refer Issue 6, page 66.*

Fixed-term Agreements

(ai)   Fixed term agreements are justified where they comply with section 66 of the Employment Relations Act 2000. They are commonly used in schools to allow the employment of replacement staff when permanent staff are away on leave, or to allow staff to be employed for project or temporary work.

(aj)   Employment on a fixed term agreement rather than a permanent position has a number of reward implications. There is the obvious lack of job security. For example if the employing school has a surplus staffing situation, a teacher on a fixed term agreement could lose a job which may not have been lost through the Curriculum and Pastoral Needs Analysis (CAPNA) process for determining which permanent position/s can best be spared. In such a case there is also a loss to the teacher of surplus staffing entitlements, including retraining, redeployment, severance or long service leave. There may also be disadvantages such as restricted opportunities for advancement with consequential results on remuneration.

(ak)   Reports to unions suggest some unjustified use of fixed term agreements for teachers. While it is not possible to tell the extent that this issue affects women teachers, it is known that women teachers are more likely to be employed on fixed term agreements (23 percent of women compared to 14 percent of men). It was noted that procedural problems such as incorrect documentation will mean a fixed term agreement is deemed unjustified.

> *The steering group found that any unjustified use of fixed term agreements for teachers was an issue (in conjunction with the same issue found to be a gender equity issue for support staff) that warranted response. Refer Issue 5, page 65.*

3.1.2 PRINCIPALS - findings related to rewards

Rates of pay

(a)   Principals' base scale salary is determined by the size of the school student roll (U grade). There are a number of additional allowances available – a staffing component based on total number of teaching staff, decile payments for low decile schools, an allowance for principals employed in schools identified as requiring additional support for recruitment and retention, experience payments and sector specific payments. The pay analysis for principals below focuses on base pay rather than other allowances.

(b)   The steering group investigated the distribution of salaries between men and women principals in each of the different school types.

Median salary (excluding allowances) of principals by gender and school type, 2006
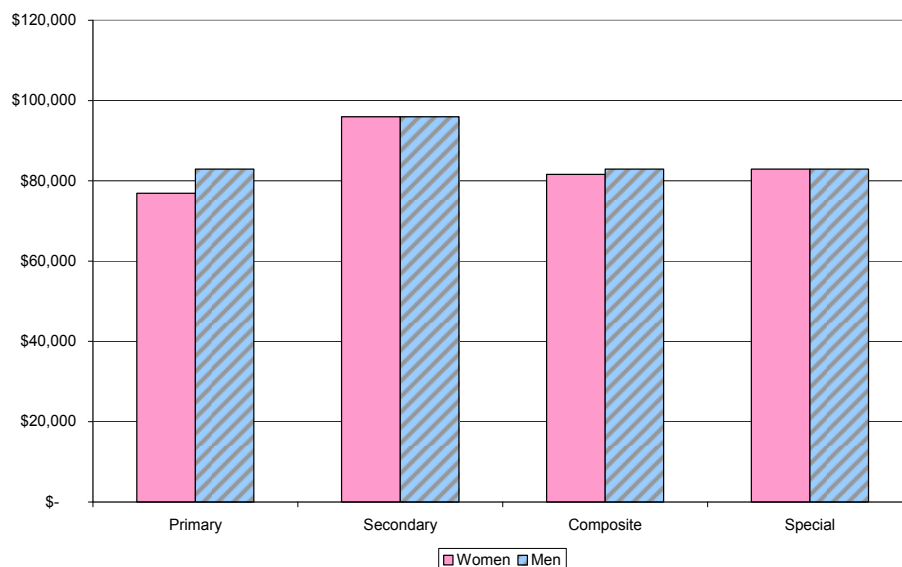
(c)   The graph above shows that in primary schools the pay gap between female and male principals is eight percent but in secondary, composite and special schools the differences between genders for principals' pay are minimal (less than five percent). The small number of composite and special schools may largely account for the differences in the distribution of salaries between men and women principals that does exist in these types of schools. A salary comparison of principals in primary schools follows.

Salary comparison of principals in primary schools

(d)   The graph below shows that the median salary of male principals in primary schools has been consistently higher than that of female principals in primary schools. There is no evidence that this pay gap in narrowing.

Median salary (excluding allowances) of male and female principals at primary schools, 1998 to 2006
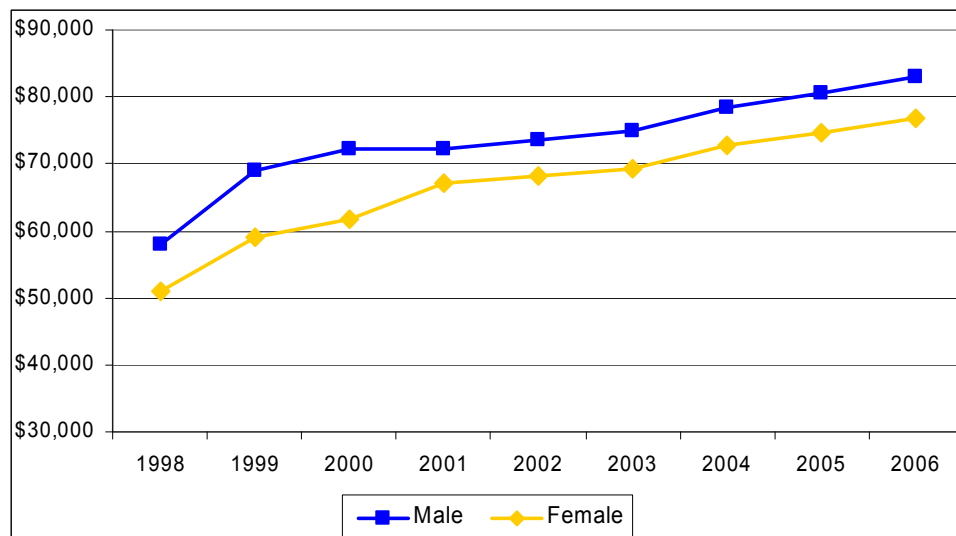
(e)   In primary schools women are more likely to be principals of smaller schools leading to lower base salaries than for men since the pay is largely determined by roll size. This difference accounts for the pay gap of primary principals. Reasons why women tend not to hold principal positions in larger primary schools were not apparent from findings gained in this review.

Proportion of male and female principals at primary schools by roll size, 2006
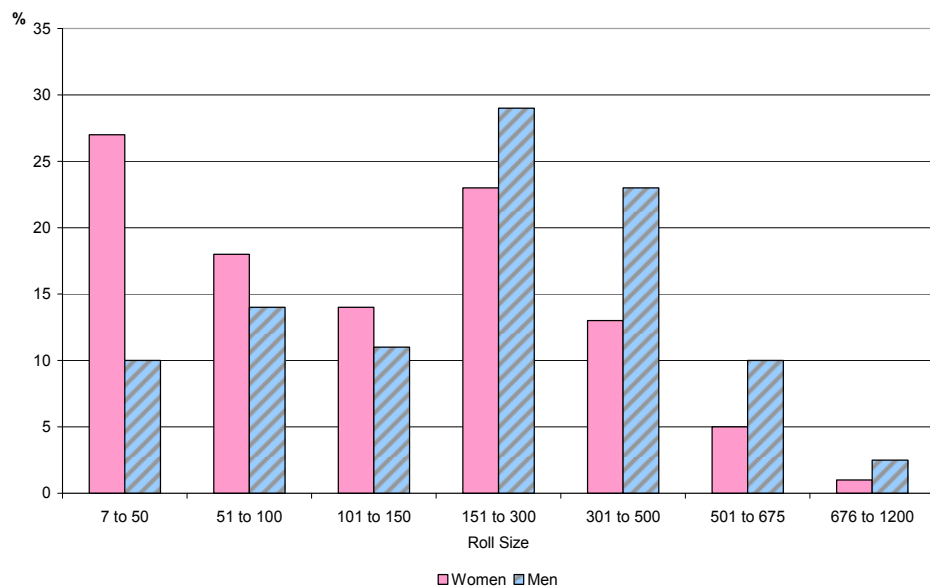
3.1.3   SUPPORT STAFF - findings related to rewards

Rates of pay

(a)   When considering support staff pay rates a question considered by the review group was whether the work of the female dominated occupations was undervalued in the compulsory school sector. Responses from several support staff employees through focus groups discussions and the supplementary perception survey raised concerns about pay rates not reflecting the work they did; rates not taking into account relevant qualifications; and although the collective agreement rates are minimums, the difficulty schools face when paying support staff must be balanced against the other areas of expenditure that must be paid from operational grant funding. NZSTA and the unions have previously expressed concerns about this[10] and the necessity to address the adequacy of funding.

(b)   Support staff responding to the first survey almost universally thought that women and men were paid equally within the school (99 percent), but fewer agreed that they were paid fairly compared to others doing similar or the same work within the school (65 percent). This percentage was considerably lower than teachers (80 percent).

(c)   During the pay and employment equity review, over half of the support staff focus group agreed that 'women's work' was undervalued (one quarter of this group were teacher aides). There is a feeling amongst some support staff that there are not equitable rewards for support staff and the overall attitude towards support staff seems to be of "undervaluing them, their work and on a personal basis" (School Review Report).

(d)   Concern was also raised about the value placed on librarians work. The steering group noted that a pay investigation was a possibility for public sector librarians and that this may include school librarians.

(e)   It is also possible that the work undertaken by support staff in the compulsory school sector, in particular cleaners and teacher aides who represent most of the characteristics of female dominated occupations, is undervalued because of historical gender bias.

> *The steering group recommended pay investigations be undertaken for two large support staff occupational groups – teacher aides and cleaners. Refer Issue 3 and 4, pages 61 and 63.*

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[10] Review of Schools Operational Funding Report to the Minister of Education, November 2006.

Grade and step

(f)   Focus group attendees raised concerns about some support staff covered by the Support Staff in Schools' Collective Agreement being placed on inappropriate scales and grades. The Support Staff in School's Collective Agreement is a minimum rates document and it is known that a number of support staff are paid above the minimum. However, NZEI Te Riu Roa and NZSTA have received questions from employers about how to determine the appropriate scale and grade suggesting there may be an issue regarding employer and employee understanding of this process. As a result of a focus being placed on this issue in recent bargaining rounds, a working party has been established to investigate inter alia clearer definitions.

(g)   Where the grade is inappropriate, this will affect the pay rate. If support staff are classified on the Associate Scale instead of the Administration Scale[11], their ability to progress salary steps with increased experience is more limited. Since support staff group are female dominated, inappropriate placement may cause barriers to the pay and advancement of women. Likely causes of inappropriate placement are unclear definitions of the intention of the support staff scale and grading system.

(h)   The number of support staff potentially affected by inappropriate placement on grade or step or both is unknown as pay records indicate only what the classification is and grades people are placed on, and not whether these have been appropriately placed. A 2007 Employment Court case, *The Red Beach School Board of Trustees v The Attorney-General in Respect of the Secretary for Education, AC 13/07*, which found in favour of a group of teacher aides at one school, has further highlighted this issue.

> *The steering group found that inconsistent or inappropriate placement on grade or step for support staff covered by the Support Staff in Schools' Collective Agreement was a gender issue that warranted response. Refer Issue 2, page 60.*

Incremental pay steps

(i)   Indications from the analysis of payroll data are that some employees who are covered by the Support Staff in Schools' Collective Agreement are not receiving incremental steps when they may be due. While there are some legitimate reasons for this occurring, for example employees being at the top of the scale, the numbers involved suggested that there is an issue to be addressed.

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[11] See part 3 of the Support Staff in Schools' Collective Agreement.

(j)   To size this issue, analysis was undertaken of support staff in administrative positions (executive / clerical, school secretaries and typists) and teacher aides. Analysis focused on union members as they are all employed on the Support Staff in Schools' Collective Agreement and therefore should be receiving incremental steps (subject to their performance and not being at the maximum step for their grade). The nature of the agreements of non-union members and whether they are entitled to annual increments are not known and therefore non-union members were excluded from the analysis.

(k)   A total of 3,100 staff were identified as having been employed in the same position over an 18 month period[12], all of these staff were paid at the rate specified in the collective agreement (i.e. were not paid above the minimum rates). Of these staff around 900 were already at their grade maximum and so were not eligible for an annual increment. The remaining 2200 staff should have received an annual increment subject to satisfactory performance. However, 530 of these staff did not receive an annual increment. This represents 24 percent of staff eligible to receive an increment (or 17 percent of all staff analysed).

(l)   In order for support staff to receive their annual increments the school is required to undertake the staff members' performance appraisal process, and then inform their payroll centre that the increment is due. Likely causes or contributing factors to this not occurring are:
- failure of school employers to realise that an increment is due for their support staff; and subsequently omitting to inform payroll
- support staff report they are less likely than teachers to receive their annual performance appraisal, and
- school only receive automatic reminders that teachers' annual increments are due. They do not receive a similar notification that support staff annual increments are due.

  The steering group found that some support staff covered by the Support Staff in Schools Collective Agreement are not receiving annual increments when they are due was a gender equity issue that warranted response. Refer Issue 1, page 56.

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[12] An 18 month period was chosen as although increments should occur every 12 months, it was considered reasonable to allow some additional time for schools to hold annual performance appraisals and inform the Ministry of the need for an increment.

Rewards other than pay - Annualisation

(m)   Focus group attendees noted that fixed term support staff employees, the majority of whom are women, are currently ineligible for annualisation pay (a term of the Support Staff in Schools Collective Agreement). Annualisation of pay was brought in during 2007-2008 allowing permanently employed support staff employees who are not employed in term breaks to opt to be paid a regular lower amount spread over a full year, rather than receive their pay only when working during the school terms. At present this entitlement is only available to permanent support staff employees and not to those on fixed term agreements. The steering group also examined those who are employed on fixed term agreements for more than one year. For example there are many women employees employed as Ongoing Renewable Resourcing Scheme (ORRS) funded teacher aides who are employed on fixed term agreements on a year by year basis. This group of mainly women could benefit from being able to access this provision.

(n)   Analysis of payroll data shows that around 13 percent of all administrative staff and teacher aides have opted for annualised pay. This is an understatement as the percentage is based on figures that also include fixed term staff that are currently not eligible for annualisation. It is not possible to identify the numbers on fixed term agreements from payroll data to exclude them from this calculation. Clearly though, this shows that annualisation has been a useful option for a number of staff.

> *The steering group found that ineligibility for pay annualisation for fixed-term support staff on the Support Staff in Schools Collective Agreement was a gender equity issue that warranted response. Refer Issue 8, page 70.*

Advancement

(o)   The supplementary perception survey asked whether respondents were interested in advancement within their current school or at another; and also asked if respondents were confident about their prospects for advancement at their current or at another school. The term 'advancement' was not defined in the survey and could have been perceived as meaning taking on a senior role, moving to new higher paying position or movement up the pay scale of their current position.

(p)   Although more than half of the support staff (59 percent) indicated they were confident about their prospects for advancement, this figure was low compared to teachers (77 percent of who were confident). Support staff working in secondary schools showed lower levels of confidence in prospects for advancement than those in primary and composite schools. It was noted that support staff in secondary schools reported receiving less encouragement to apply for promotion than other groups. The steering group noted there are no obvious pathways for advancement within support staff positions in schools and no readily available information that explores support staff advancements or progress to more senior positions so the responses received about advancement were to be expected. Further research into this issue would be useful.

Effect of break in employment or service entitlements

(q)   When the collective agreement provisions for support staff groups were examined, concerns were raised about the effects breaks in employment had on some service entitlements. For instance, for those on the Support Staff in Schools' Collective Agreement, a break of employment for more than three months results in loss of entitlement to sick leave accumulation, additional annual leave after five years service, and service calculated in cases of redundancy. In the context of school environments, support staff in schools have fewer entitlements than teachers.

> *The steering group found that the effects of a break in employment on service entitlements for support staff was a gender equity issue that warranted response. Refer Issue 9, page 71.*

Effects of absence for childcare on service entitlements

(r)   Examination of support staff collective agreements[13] showed that the effect of absence for childcare appeared to be inequitable with teachers in schools). Absence for childcare reasons (other than parental leave) for longer than three months results in a break in service with subsequent loss of service entitlements.

> *The steering group found that the effects of absence for childcare on service entitlements for support staff was a gender equity issue that warranted response. Refer Issue 10, page 72.*

Fixed-term agreements

(s)   As is the case for teachers, reports to unions suggest some unjustified use of fixed term agreements for some support staff. The steering group noted that fixed term agreements can be justifiable and the most common reason for this in schools is ORRS funding for teacher aides which is short to medium term. This funding follows the child with special needs and is therefore not guaranteed to the school from one year to the next. However, the steering group thought that boards could consider employing some ORRS funded teacher aides on permanent agreements when they work in a sizable group and a core group are employed on a year by year basis over several consecutive years. The issues arising for support staff on unjustified fixed term agreements may be compounded by the present funding arrangements. NZSTA and unions have previously expressed concerns about this[14] and the necessity to address the inadequacy of funding.

> *The steering group considered that where any unjustified use of fixed term occurred it was a gender equity issue that warranted response. Refer Issue 5, page 65.*

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[13] Support Staff in Schools Collective Agreement, Caretakers and Cleaners Collective Agreement and Kaiariahi i te Reo, Therapists', ATSSD and Special Education Assistants Collective Agreement.
[14] Operation Funding Review Report to the Minister of Education (2007).

3.2 Participation

The questions related to participation that were considered in the review are listed below:

> ***Do women and men have equitable access to key training and development opportunities?***
> *Gender differences in those who have undertaken professional development in the last year. In those given informal development opportunities e.g. acting up / secondment.*
>
> ***Are women and men appropriately represented across all occupations and work areas?***
>
> ***Do women and men actively contribute influence and advice to all important areas of schools?***
> *Opportunities to express views at staff / planning meetings, gender composition of groups of most influence or useful career development, support staff opportunities to meet as a group / occupational group, barriers existing for support staff participation in decision making groups, means of support staff bringing issues to attention of teachers / managers / board of trustees.*
>
> ***Is there support for work-life balance for women and men at all levels of the organisation?***
> *Accessing provisions for work-life balance. Meeting times take family responsibilities into account. Which positions are available part-time, support staff remuneration for work out of hours.*

3.2.1 TEACHERS - findings related to participation

Key training and development opportunities.

(a) The first survey results indicate high percentages of men and women teachers believe:
  - they are provided with good opportunities for professional development (93 percent)
  - professional development was sufficient to enable them to do their job (92 percent)
  - they received encouragement to participate in activities that would help meet their own professional development needs (92 percent), and
  - that professional development was allocated equitably to women and men (91 percent).

  No gender differences were noted with regard to the types of professional development teachers undertook.

(b) Results from the second survey indicated that:
  - secondary teachers are less confident than primary teachers that they are provided with good opportunities for professional development

- nearly a quarter (23 percent) of respondents reported that they had not agreed a professional development plan with their manager during the last 12 months and these responses may suggest the need for stronger links between professional development and performance appraisal

- barriers to undertaking professional development had been experienced by 35 percent of respondents to the second survey. Of this group more women (12 percent) than men (seven percent) reported this was due to family responsibilities, and

- recognition of the professional development undertaken by teachers was similarly reported by women and men teachers overall. More women reported they were given either no recognition for undertaking professional development (women 43 percent, men 32 percent), or that they were given increased responsibility (women 24 percent, men 16 percent). Responses by composite school teachers were too few to draw inferences from.

(c)   The steering group did not consider the gender differences in these responses were statistically significant enough to warrant a response, but noted that future reviews should monitor for any change.

Representation across occupations and work areas

Teachers in management

(d)   This section shows the overall representation of women teachers within management[15] according to whether these groups are female dominated (more than 70 percent women), male dominated (more than 60 percent men) or dominated by neither gender. Issues about the appropriate representation of women have been discussed under the rewards section on page 24.

Percentage of women teachers by management/non-management and school type: 2006

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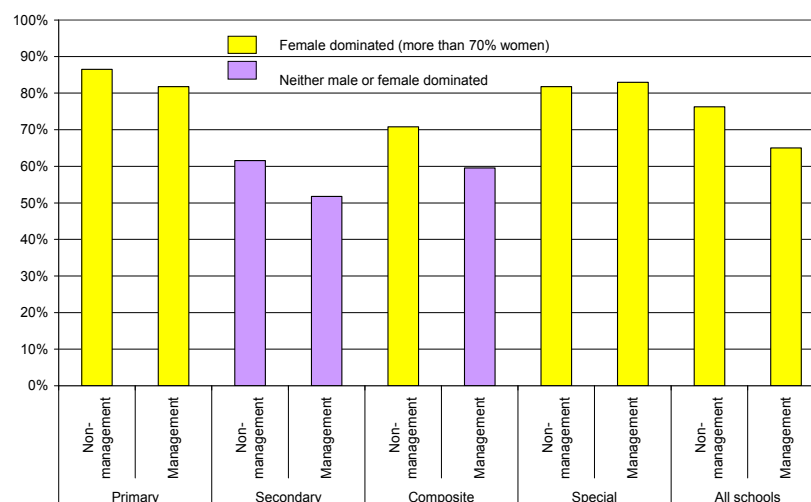
[15] Teachers have been divided into management and non-management according to whether they hold permanent units. Teachers who do not hold permanent units are classified as non-management. Teachers who hold between one and three permanent units are classified as middle management. Teachers who hold more than three permanent units are classified as senior management.

Contributing influence and advice

(e)   There were high levels of agreement that both men and women teachers had opportunities to attend meetings and contribute their ideas to work teams (around 90 percent for both primary and secondary sectors).

(f)   Secondary teachers however were less confident about their ability to contribute influence and advice than their primary colleagues. 25 percent of secondary teachers were not confident that they had the opportunity to put their views to senior management or at full staff meetings compared with 12 percent of primary teachers. No significant differences were noted between women and men's responses.

(g)   Gender differences were evident for secondary teachers with regard to other aspects of participation, with women showing less confidence than men about their ability to participate and have their views considered:
    ▪ 31 percent of women did not agree that there were processes in place for putting issues to the board of trustees, compared to 19 percent of men
    ▪ 32 percent of women did not agree that their views were considered fairly by managers and colleagues, compared to 16 percent of men, and
    ▪ 31 percent of women did not agree that they received feedback on meetings they could not attend, compared to 18 percent of men.

> *The steering group found that lack of ability to contribute influence and advice for some women teachers was a gender equity issue that warranted response. Refer Issue 15, page 79.*

Support for work-life balance

(h)   Responses about work-life balance were similar for women and men teachers. Results from both surveys indicate that high proportions of teachers agree that:
    ▪ their school fairly considers requests for flexible hours (77 percent); and
    ▪ leave arrangements are sufficiently flexible to handle important family issues (85 percent).

(i)   Teachers were much less positive that their school assists them to achieve a work-life balance (33 percent of respondents to the first survey, and 43 percent of respondents to the second survey considered their school did not assist them to achieve a work-life balance).

> *The steering group considered that concerns about work-life balance for teachers was a non-gender issue and recommended the issue be noted for response in other settings.*

(j)   Where teachers had taken time off to care for family members, results from the first survey indicate that women were more than twice as likely to use unpaid leave than men (ten percent of women compared with four percent of men). Reports to unions also indicate that women teachers use more of their sick leave for domestic leave purposes than men. At the time of writing this report, there was no payroll data available to inform this issue. The effect of women teachers disproportionately using leave without pay for domestic reasons may

suggest that when ill themselves, or when dependents need further care, women come to work when unwell, or need to take further leave without pay. The steering group noted that when teachers are sick during term breaks no sick leave is deducted meaning their sick leave entitlement (approximately ten days a year) are spread across 40 weeks. The nature of working in schools, however, means that annual leave cannot be taken in term time, so that when sick leave is exhausted, leave without pay is the teachers' only recourse unless the employer provides discretionary paid leave at the board's expense.

The steering group found that greater use of sick and domestic leave by women teachers leads to a gender equity issue that warranted response. Refer Issue 12, page 74.

3.2.2 PRINCIPALS - findings related to their participation as employees

Key training and development opportunities

(a)   Several principals attending focus group discussions reported positively about support from boards of trustees in terms of providing adequate and appropriate professional development. Several commented that their development focus was linked to needs identified through the performance appraisal process. Other principals reported more negative experiences, but there was no gender difference noted in these responses.

Representation across occupations and work areas

(b)   This section shows the overall representation of women principals within each school type according to whether these groups are female dominated[16] (more than 70 percent women), male dominated (less than 40 percent women) or dominated by neither sex. Issues about the appropriate representation of women have been discussed under the rewards section on page 27.

Proportion of female principals by school type, 2006

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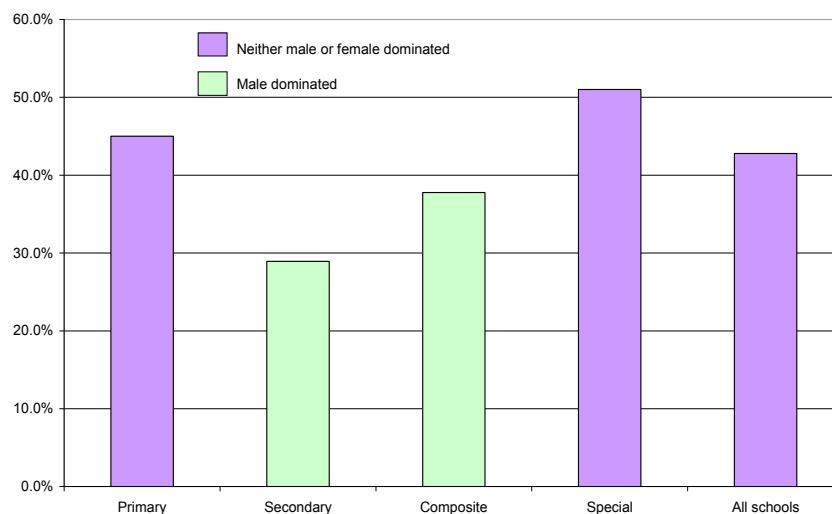
[16] Female and male dominated percentages as defined by the Department of Labour Pay and Employment Equity Unit.

Contributing influence and advice

(c)   Principals noted that some boards of trustees did not have a clear understanding of the difference between their governance role and that of the principal's role in management. The principals' focus groups were held in the months following board of trustees elections, so some perceptions may reflect the fact that new board of trustees members were 'coming up to speed'. No gender difference was noted in these responses.

Support for work-life balance

(d)   Many principals reported good support from board of trustees in maintaining a sustainable work-life balance. This support was usually obtained through positive relationships between principals and board of trustees' chairpersons.

(e)   However, some principals reported frustrations of working with boards of trustees who they viewed as lacking the understanding of what the principal's job entailed and were therefore not in a position to offer the professional support the principals needed or desired. Some principals reported that extra workloads resulted for them when board of trustees relied heavily on their advice or did not yet understand the line between governance and management. No gender difference was noted in these responses. The board of trustees as an employer's 'voice' was not investigated in relation to these findings and it needs to be noted that boards of trustees have a governance function, as well as an employer role.

(f)   A New Zealand Council for Educational Research report[17] written for the NZ Principals' Federation noted that 70 percent of principals were optimistic about their life and job as a principal and "most thought that their staff and board of trustees valued the work they did as a principals" (page 7).

(g)   However the NZCER report noted that 40 percent of the respondents described their stress level as high or extremely high and that stress levels were higher for women, Māori or non-European principals (Page 7) but "there were no marked differences related to school characteristics. The stress levels were associated with many aspects of wellbeing and health, and with aspects of the role and workload of principals" (Page 7).

(h)   Cathy Wylie[18], reported that a further national survey into principals' wellbeing and stress, conducted by NZCER in 2007, noted there was no change regarding stress experienced by principals. The results noted 38 percent were in the high stress category, four percent in extremely high; 42 percent in total. This is an increase compared with the 40 percent recorded in the 2005 NZCER report.

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[17] Hodgen & Wylie, September, 2005.

[18] Wylie, Cathy, Presentation to the Principals' Wellbeing / Hauora Forum hosted by the NZ Principals' Federation, 16 June 2008.

(i) As stated in section 3.1, ongoing work on progressing Principals' Wellbeing / Hauroa[19] may assist with addressing the work life balance of principals. The project on professional supervision for principals, being undertaken in 2008[20] could also provide further support; this project is intended to provide:

- analysis of issues creating the current need for professional supervision
- analysis of the professional supervision structures currently used for principals and other comparable New Zealand professions
- a summary of the evidence on the effects on principals in their role as leader of learning
- options for improving the provision and quality of professional supervision, and
- recommendations and the identification of the potential resourcing implications.

The steering group found that principal stress and well-being was a non-gender issue to be noted for response in other settings.

3.2.3 SUPPORT STAFF - findings related to participation

Key training and development opportunities

(a) The steering group found that professional development opportunities for support staff were more limited than for teachers. Two thirds of support staff respondents to the supplementary perception survey had experienced barriers to taking up professional development opportunities. The major barrier reported was not being offered any opportunities; others were the lack of a professional development plan, family responsibilities and costs to the school or the individual.

(b) School review reports indicate that many support staff:
- were not aware of relevant training and development opportunities;
- did not have professional development clearly linked to performance appraisal
- found there were cost barriers to attending professional development courses in their region and outside it, or
- did not think that courses on offer were sufficiently relevant to attend.

For example, one school review report noted that while teacher aides have access to the Special Needs teacher to discuss any issues or training there is very little external relevant professional development.

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[19] Principals Wellbeing / Hauora Forum is the work promoted by the NZPF and arises from an annual forum where a number of the key stakeholders from the sector (NZEI, MoE, Teacher Council, CEO, NZSTA) participate in identifying strategies to address this issue.
[20] Agreement to undertake this project was contained in the settlement of the 2007-2010 Primary Principals' Collective Agreement.

(c)   Responses from the first survey indicate that while support staff are generally positive about professional development, their responses were consistently less positive than those of teachers. Eighty percent (70 percent in the second survey) of support staff respondents agreed they were provided with good opportunities for professional development, they had sufficient opportunities to enable them to do their job, and they were encouraged to participate in activities that would help their professional development needs. This compared with teachers' responses which were around 90 percent for all these questions. Far fewer support staff (58 percent) than teachers (72 percent) reported they had agreed a professional development plan with their managers within the last 12 months, perhaps reflecting the lower numbers of support staff compared with teachers who had received their performance appraisal in that timeframe. Responses to the survey indicate that support staff are also much less likely to be offered professional development than teachers.

> *The steering group found that access to professional development for support staff was a gender equity issue that warranted response. Refer Issue 13, page 76.*

(d)   On a positive note, when support staff undertake professional development it is more likely to be recognised than teachers (69 percent for support staff compared with 56 percent of teachers reported they had some form of recognition) particularly for primary school support staff (75 percent). Support staff thought men and women had equal access to professional development.

(e)   Recognition of the new skills gained through professional development was most likely to take the form of increased responsibilities or changes to support staff pay. For example, a qualifications payment, for gaining a new qualification is provided for in the collective agreement. The steering group noted that there is currently no uptake of any relevant qualifications by cleaners employed directly by schools recorded by the Building Services Industry Training Organisation (ITO)[21]. This is an issue for this occupational group.

Representation across occupations and work areas

(f)   Support staff taken as a whole group is female dominated (82 percent). The graph below shows the gender composition of support staff occupational groups according to 2006 payroll data. (Note this graph excludes occupational groups with less than 100 staff).

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[21] Industry Training Organisation that provides training for cleaners.

Percentage of women in support staff occupational groups, 2006
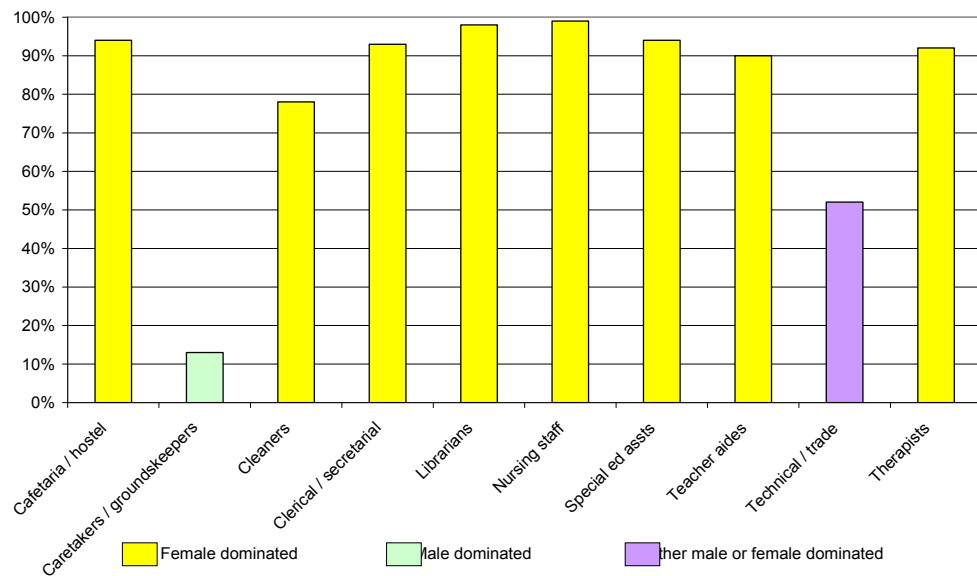
Contributing influence and advice

(g)   The steering group found that for many support staff there were a number of barriers to contributing influence and advice in their place of employment. The barriers, as reported through surveys, school review reports and focus groups included:
- not being invited to attend staff meetings where whole-school discussions and decision making happened
- having no means to meet together as an occupation group within the school
- being unable to attend staff meetings scheduled outside their paid work time (i.e., not being paid to attend staff meetings), and
- not being provided with minutes of meetings.

One quarter of support staff responding to the first survey were not confident about their ability to attend staff meetings.

(h)   Secondary school support staff appear to be less confident than both their primary school counterparts, and secondary teachers about being able to put their views forward at staff meetings and having support to attend meetings.
- 64 percent of secondary support staff agreed that they had opportunities to put forward their views at staff meetings, compared to 74 percent of secondary teachers
- 68 percent of secondary support staff agreed that they had support to attend meetings, compared to 92 percent of secondary teachers, and
- 58 percent of secondary support staff agreed that they received feedback about meetings they could not attend, compared to 74 percent of secondary teachers.

(i)   Results from the second survey indicate that support staff were confident they could contribute ideas to their work team or department (91 percent). However, similarly to secondary teachers, support staff were less confident about processes in place to put issues to boards of trustees (74 percent), opportunities to put views to senior management (78 percent), and confident that their views would be considered fairly by management and colleagues (72 percent).

(j)   Secondary support staff were much more likely than secondary teachers to think that part-time staff were disadvantaged with regards to support to attend meetings or the ability to be on committees.
  ▪   43 percent of secondary support staff felt that part-time staff were disadvantaged in regards to invitations to attend meetings or be on committees, in comparison to 17 percent of secondary teachers, and
  ▪   57 percent of secondary support staff felt part-time staff were disadvantaged in regards to the ability to attend meetings, compared to 38 percent of secondary teachers.

    The steering group found that this disadvantage in comparison to their teaching colleagues to contribute, influence and advice for support staff was a gender equity issue that warranted response. Refer Issue 14, page 78.

(k)   On a positive note, some school review reports provided evidence of good management practice occurring in several schools. In those schools support staff reported that they were consulted about relevant issues; felt included in discussions and staff activities; were given the opportunity to attend meetings, and were supported to do so (for example by being paid for that time or having their children looked after or able to utilise school facilities during the meeting).

(l)   As a result of participating in the review, one school decided to install individual 'pigeonholes' for all support staff, including part-time cleaners so they would receive any relevant material distributed to staff. This school also decided to introduce a meeting once a term with all cleaners, the caretaker and the principal.

Support for work-life balance

(m)   The majority of support staff surveyed were positive that their school assists them to achieve a good work-life balance, and that requests for altered work hours were considered fairly (an average of 82 percent agreed across both surveys). Women were more positive than men about their school providing support to achieve work-life balance. Primary support staff tended to be more positive than those working in secondary schools, and support staff as a group were more positive about this aspect than teachers.

(n)   Results from the first survey and reports to unions indicate that support staff use leave without pay to care for family members more frequently than teachers; and that woman support staff and teachers use leave without pay more frequently than men. The effect of women support staff disproportionately using sick leave for domestic reasons is often that when ill themselves, women need to take leave without pay or come to work when unwell.

(o)   Comparisons of support staff and teacher groups show the extent of this issue. Results from the first survey (193 support staff) indicate that 41 percent of support staff had taken time off to care for children or family members within the last 12 months. Of those reporting, 25 percent of support staff said they had taken leave without pay. Gender comparisons indicate that 12 percent of women support staff had taken leave without pay to care for family members compared with only three percent of men.

(p)   Support staff are provided with six or seven days sick leave per year, and can use up to eight days per year from accumulated sick leave for domestic leave purposes. They are more likely than teachers to require leave without pay to care for children or other family members (ten percent of support staff, seven percent of teachers). For example, a school review report noted that "Lack of sick leave to look after children is a gender equity issue for support staff".

> *The steering group found that inequitable provision of sick and domestic leave for support staff was a gender equity issue that warranted response. Refer Issue 12, page74.*

(q)   *Support staff – pay for expected work.* School review reports indicate that some support staff feel they are expected to work longer hours to attend school functions, trips, or meetings. Union reports indicate that some support staff were expected to work beyond their normal hours and that some were not paid for this time. Employers reported that some support staff attend functions, trips or meetings, where they were not expected to, which leads to confusion as to whether that is part of their paid role. In some cases this practice relates to Ongoing Renewable Resource Scheme funded teacher aides who are expected to attend individual education programme meetings in an unpaid capacity. The current Ongoing Renewable Resource Scheme funding system pays the teacher aide only for time with the specified student. Funding for additional hours must come out of schools' operational grants or other funds. The steering group noted that it is an employer decision whether to fund teacher aide attendance at such meeting, but agreed that expectations as to attendance and whether the time is paid should be made clear to the employee. The steering group noted that employees may sometimes wish to attend meetings because they feel it is relevant to their work, when it is in fact not required and/or expected within their role or job description.

> *The steering group found that lack of clarification about expected work, and whether that work is paid for support staff was a gender equity issue that warranted response. Refer Issue 11, page 73.*

3.3 Respect and Fairness

The questions related to respect and fairness considered in the review were:

> *Do women and men have equal confidence that the school is taking active and deliberate steps to minimise the risk of discrimination, harassment and bullying and would respond appropriately if they occur?*
> *Is there a policy that articulates what constitutes discrimination, harassment and bullying, and how they may be addressed in the school? Were staff involved in development and updating the policy? Is the policy actively promoted and staff are aware of it? Does the school monitor the incidence of these occurring for staff / is the policy actively enforced?*
>
> *Is the system fair for evaluating the performance of both women and men?*
> *Is the system understood? Is there a gender difference in experience of the system? Do women and men have similar levels of confidence in the fairness of the system? Do support staff have job descriptions? Are appraisals against the job description? Can support staff negotiate changes to their job description? Is professional development linked to performance appraisal?*
>
> *Do women and men have equal experience of being treated fairly and equitably by their managers?*
> *Are men and women treated with fairness and respect by managers? Do men and women have access to resources to enable them to do job? Is there a process in place to ensure that workloads are allocated fairly among staff?*

3.3.1 TEACHERS - findings related to respect and fairness

Minimising discrimination, harassment and bullying

(a) The steering group noted that it is one of the roles of a board of trustees, as good employer, is to set, audit and review policies and procedures in the school to foster continual improvement. Principals as the chief executives put the board of trustees policies into practice. Board of trustees membership includes a staff representative, and principals can involve the wider staff in the development of the processes and procedures that underpin the board of trustees policy and this is likely to involve consultation with staff prior to developing a policy, but it is the responsibility of a board of trustees to set policies. The steering group recognised the importance of a whole of school approach in developing effective polices to prevent bullying and harassment.

(b) School review committees tended to focus on whether a policy existed or not, and all nine schools did have a policy.

(c) Results from the second survey, which focused on this area more than the first survey, indicate significant numbers of teachers considered they did not have the opportunity to be involved in policy development; thought that harassment policies were not adequately promoted; and that their school did not deal appropriately with cases of bullying, harassment and discrimination.

(d)   It was concerning that some teachers reported that their school did not have a policy on the prevention of bullying, harassment and discrimination. The development of effective policies to prevent bullying and harassment takes a whole-of-school approach which involves parents, staff, and students. The need to establish clear guidance on what was acceptable behaviour or not within the school environment was noted.

(e)   Results from the second survey from 393 teachers indicate the following:
- 19 percent believed their school did not have a policy on bullying, harassment and discrimination
- 32 percent consider they did not have opportunities to be involved in policy development
- 46 percent did not believe the policy was sufficiently promoted in their school, and
- 32 percent believed their school did not deal fairly and appropriately with cases of bullying, harassment or discrimination.

(f)   There are differences between primary and secondary teacher responses regarding experiences of bullying, harassment and discrimination policies:
- 21 percent of secondary teachers believed their school did not have a policy compared with ten percent of primary, and
- 36 percent of secondary teachers believed their school did not deal fairly and appropriately with cases of bullying, harassment and discrimination compared with 19 percent of primary.

These numbers show this is a significant issue for staff in both primary and secondary sectors.

(g)   Gender differences were evident for secondary teachers (where the number of responses made gender comparisons possible) in both the promotion of the policy and schools dealing fairly with harassment cases. In both cases women were considerably less likely to agree than men.
- 51 percent of women did not believe the policy was sufficiently promoted compared to 39 percent of men, and
- 44 percent of women believed their school did not deal fairly and appropriately with cases of bullying, harassment and discrimination compared to 23 percent of men.

The steering group found that concerns about awareness and effectiveness of policies and practices to prevent bullying, harassment and discrimination by significant numbers of teachers was part of a wider gender equity issue also affecting support staff. Refer Issue 17, page 83.

Fair performance evaluation

(h)   School review reports and results from the first survey indicate little gender difference and high levels of agreement that job performance was fairly assessed, and honest and frank feedback on performance was given.

(i)   Around 80 percent agreed that they had accurate up to date job descriptions although only 70 percent thought they had opportunities to negotiate changes to their job description. Women were more likely to report positively about these aspects than men.

Fair and equitable treatment by managers[22]

(j)   Results from the first survey results indicate little gender difference and high levels of agreement (94 percent) in experience and perception of being treated fairly and with respect by managers. Similar numbers agreed that they had access to resources enabling them to do their job.

(k)   Most respondents (85 percent) were confident that their school deals fairly with discrimination, harassment and bullying: however women teaching in secondary schools were more likely to report this wasn't the case (17 percent compared with 11 percent of men in the secondary sector).

> *The steering group found this formed part of a gender equity issue affecting support staff, and women teachers in particular, and was a gender equity issue that warranted response. Refer Issue 17, page 83.*

3.3.2   PRINCIPALS - findings related to respect and fairness

Fair performance evaluation

(a)   Many principals attending focus groups reported fair performance appraisals for them in place. Conducting performance appraisals for principals was sometimes contracted outside the board of trustees.

3.3.3   SUPPORT STAFF - findings related to respect and fairness

Prevention of discrimination, harassment and bullying

(a)   Results from the first survey (94 support staff) indicated that while the majority agreed (86 percent) that their school had a policy on prevention of discrimination, harassment and bullying, there were significant numbers of support staff who:
- did not have opportunities to be involved in policy development (42 percent)
- thought harassment policies were not adequately promoted (37 percent), and
- believed their school did not deal fairly and appropriately with cases of bullying, harassment and discrimination (32 percent).

(b)   Comparisons within the secondary sector showed that secondary support staff were:
- less likely than teachers to have had opportunities to be involved in policy development (support staff 53 percent; teachers seven percent)
- more likely than teachers agree that the policy had been actually promoted (support staff 64 percent; teachers 54 percent), and

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[22] Manager was defined as the person the employee reported to (e.g. supervisor, syndicate leader, head of department, etc) and was most likely the person responsible for performance appraisal).

- responded similarly to teachers about whether their school dealt fairly and appropriately with bullying, harassment and discriminatory (support staff 70 percent; teachers 64 percent).

> *The steering group found that concerns about awareness and effectiveness of policies and practices to prevent bullying, harassment and discrimination by support staff was part of a wider gender equity issue. Refer Issue 17, page 83.*

Fair performance evaluation

(c)   *Support staff – job descriptions and performance management.* Responses from the first survey indicate support staff are less likely to have had a letter of appointment (86 percent of support staff receive a letter compared to 97 percent of teachers). A possible cause could be the higher proportion of support staff who indicated they had initially worked in schools as a volunteer and therefore may not have all the usual formalities when appointed to their position; however, this practice needs to be addressed. The first survey showed support staff are more likely to have worked in a volunteer capacity (22 percent compared to six percent of teachers in both sectors). In primary, approximately 40 percent of support staff indicated they had previously worked in a volunteer capacity.

(d)   Support staff in secondary schools are less confident than their primary school counterparts about receiving feedback. Little gender difference was noted, but the steering group considered that performance evaluation was an issue for the support staff sector as a whole and recommended a response strategy to address this issue.

> *The steering group found that lack of clear job descriptions and performance management processes for some support staff was a gender equity issue. Refer Issue 16, page 81.*

(e)   On a positive note, as a result of participating in the review one school decided to improve professional feedback for cleaners and caretaker through individual discussions with the principal about the positive and negative aspects of their role; their professional development aspirations for the next year; and their contribution to the overall efficiency and effectiveness of the school.

Fair and equitable treatment by managers

(f)   School review reports include reports from some support staff that they felt bullied by managers and/or by teaching staff. The steering group noted these concerns which added weight to the decision that prevention of bullying, harassment and discrimination was a gender equity issue for support staff.

> *The steering group noted these concerns which added weight to the decision that prevention of bullying, harassment and discrimination was a gender equity issue for support staff. Refer Issue 17, page 83.*

4.0   Conclusions

4.1   Working well findings

4.1.1   The steering group found many positive areas where pay and employment equity was in evidence. These included the equitable basis on which teacher base scale pay is determined.

4.1.2   In addition, some school communities reported:
- high levels of respect and fairness experienced by support staff and teachers
- good provision for professional development for all staff
- fair assessment of job performance
- schools' management was strongly represented by women, and
- equitable treatment for men and women, and for different occupational groups was perceived to be the norm.

4.2   Gender equity issues requiring a response

4.2.1   Key issues that have been identified to be addressed as a high priority are:
1   Support staff – some not receiving incremental pay steps when they are due
2   Support staff – inconsistent grading and placement on scales and steps
3   Cleaners – work may not be valued appropriately
4   Teacher Aides – work may not be valued appropriately
5   Support staff and teachers – possible unjustified use of fixed-term agreements
6   Teachers – gender disadvantage for women teachers and principals in career advancement
7   Teachers – inequitable provision of classroom release time or non-contact time for part-time teachers.

4.2.2   Other priority issues that are related to contractual entitlements or have a legal basis for the concern are:
8   Support staff – the ineligibility for annualised pay experienced by fixed term employees
9   Support staff – effect of break in employment on service entitlements
10   Support staff – effect of absence for child care on service entitlements
11   Support staff – lack of clarity about work expectations and whether that work is paid
12   Support staff and teachers – domestic and sick leave provisions.

4.2.3   Priority issues that are related to policies and practices in the employment environment are:
13   Support staff – lack of access to professional development for some employees
14   Support staff – lack of ability to contribute influence and advice
15   Women teachers – lack of ability to contribute influence and advice
16   Support staff – lack of clear job descriptions and performance management processes for some employees
17   Support staff and teachers – awareness and effectiveness of policies and practices to prevent bullying, harassment and discrimination.

4.3   Non-gender issues to be noted

4.3.1   During the course of the review two main issues arose that were not differentiated by gender. While these issues are outside of the scope of this project, it was agreed they should be noted. They are:

- Teachers – issues of work-life balance
- Principals – some principals reported a lack of understanding of the principals' work by boards of trustees, and a lack of understanding of the line between governance and management roles. They also reported issues related to high workload and stress. As a consequence principals perceived a lack of appropriate support from boards of trustees.

4.4   Issues considered but not included for response

4.4.1   Participation in retirement savings was an initial area of interest to the review group. However, as the pay and employment equity review occurred around the introduction of the Kiwisaver scheme, it was anticipated that greater numbers of women in all occupations would take the opportunity to participate in this or other superannuation schemes. For this reason the steering group did not consider that a separate response strategy was needed for employees in the compulsory education sector.

4.4.2   The steering group did, however, note findings from a 2005 report prepared by Litmus for the State Services Commission[23]. This report stated that barriers to joining the State Sector Retirement Savings Scheme (SSRSS), by education service employees, fell into six categories. Those who:
- were unaware of SSRSS
- cannot afford it
- were bewildered
- deemed it is not right time now
- plan to leave service, and/or
- are well prepared for retirement.

4.4.3   The report also found that non-teaching staff were considerably less likely than teachers to participate in the SSRSS and noted that the "overriding reason given by non teaching staff for not joining was affordability, due to:
- low income
- uncertain future employment, and/or
- not being paid during the school holidays".
The respondents in the State Services Commission report further stated that they did not see this affordability factor changing in the future.

4.4.4   The findings regarding the lower participation rates of support staff were also confirmed by data in a small number of individual school review reports.

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[23] Litmus. (November, 2005). No-one gets left behind: Understanding education service employees' response to the state sector retirement savings scheme. A report prepared for the State Services Commission: Wellington.

4.4.5   Whilst superannuation was not been a focus of this review, the steering group considered that a number of the recommendations would assist in removing some of the barriers that support staff face to participating in superannuation schemes. These include the pay investigations for cleaners and teacher aides (Issues 3 and 4), clarification of the use of fixed term agreements and encouraging permanent appointments for core Ongoing Renewable Resource Scheme funded teacher aides (Issue 5) and extending annualisation provisions to some fixed term staff (Issue 8).

4.4.6   Members of the steering group recommended that the Ministry of Education investigate the issue further, especially around participation rates of support staff accessing retirement savings options, as this group was predominantly women.

4.4.7   As discussed in 3.1.1(h), the steering group noted that analysis of participation by gender in the sabbatical leave scheme should be monitored in any future pay and employment equity reviews.

4.5   Concluding remarks and recommendations on the compulsory schools PaEE review

4.5.1   The first compulsory schooling sector pay and employment equity review has been a learning process for all involved. The steering group agrees that many positives will result from changes to current inequitable practices as identified in the review and outlined in the response plan but that this will require an ongoing focus on, and monitoring of, pay and employment equity.

4.5.2   Looking back on the review process the steering group has come to the following conclusions:
- undertaking this review has enabled members of the steering group to identify and debate matters, both positive and negative, that affect the schooling sector
- the tripartite nature of the steering group has allowed for a wide range of knowledge and experience to be involved in the process
- the review is essentially a snapshot in time. The recommendations in the report need to be seen as a way forward, and
- the review has shown a number of positives that need to be built on by implementing the recommendations if pay and employment equity is to embedded into the sector and pay and employment equity is seen as "business as usual".

4.5.3   Successful aspects of the review project include:
- the employment of a project manager coordinator
- access to the Ministry of Education data analysis advisor
- the employment of a union coordinator to work with the unions and their members, and a NZSTA coordinator to work with boards of trustees and principals
- the establishment of a working group that reported to the Steering Group allowed for work to progress speedily
- the wide range of experience and knowledge of the sector by members in the Steering group and working group added greatly to the debate, and
- the nature of the steering group - the Ministry of Education, four unions and NZSTA meant that different perspectives were brought to the review.

4.5.4   Recommendations for future years:

The steering group recommends that:

(a)   A monitoring group be established which represents the Tripartite Steering Group membership and is tasked with:

- monitoring the implementation of the response plan and its recommended strategies

- improving central data collection on characteristics and employment conditions that affect support staff in schools, and

- keeping the Department of Labour PaEE unit informed about progression on the response plan.

(b)   A further national pay and employment equity review is conducted in three to five years to analyse PaEE in the compulsory school sector including progress on the implementation of this response plan and its recommended strategies.

(c)   Further research be conducted:

- into the status of women in support staff positions, and

- on impacts of leave provisions on support staff and teachers.

5.0 Gender equity issues and recommended response strategies

5.1 This section contains a description of each gender equity issue identified by the steering group, together with the recommended response strategies to address each issue. The issues are ordered according to which key question they arose from – rewards, participation, and respect and fairness. Within each group, those affected support staff have been listed first, then those affecting teachers.

5.2 The steering group investigated three key questions relating to pay and employment equity. The related issues are listed below each question.

- *Do men and women receive an equitable share of rewards?*

  1. Support staff – some not receiving incremental pay steps when they are due
  2. Support staff – inconsistent grading and placement on scales and steps
  3. Cleaners – work may not be valued appropriately
  4. Teacher aides – work may not be valued appropriately
  5. Support staff and teachers – unjustified use of fixed-term agreements
  6. Teachers – gender disadvantage for women teachers and principals in career advancement
  7. Part-time teachers – inequitable provision of classroom release time or non-contact time for part-time teachers
  8. Support staff – the ineligibility for annualised pay experienced by fixed-term employees
  9. Support staff – effect of break in employment or service entitlements
  10. Support staff – effect of absence for child care on service entitlements

- *Do men and women participate equitably in all areas of the school?*

  11. Support staff – lack of clarity about work expectations and whether that work is paid
  12. Support staff and teachers – domestic and sick leave provisions
  13. Support staff – lack of access to professional development for some employees
  14. Support staff – lack of ability to contribute influence and advice
  15. Women teachers – lack of ability to contribute influence and advice

- *Are men and women treated equitably with respect and fairness?*

  16. Support staff – lack of clear job descriptions and performance management processes for some employees
  17. Support staff and teachers – bullying, harassment and discrimination

5.3   The steering group has outlined recommendations for each issue. While barriers and risks to meeting these recommendations are not articulated for each issue, the group noted that possible barriers included:

- lack of clarity around roles and responsibilities in implementing and addressing the barriers
- ability to funding and resource the proposed recommendations
- operationalising it in 2,500 different workplaces, and
- legal barriers or risks.

5.4   Issue 1: Support staff – some not receiving incremental pay steps when they are due (Rewards)

Key Finding: Indications from the analysis of payroll data show that some employees covered by the Support Staff in Schools' Collective Agreement are not receiving incremental steps when they are due. The analysis involved looking at two pay periods 18 months apart. Although increments should occur every 12 months the additional six months was included for time needed by schools to hold annual performance appraisals and inform the Ministry of the need for an increment. Refer section 3.1.3 (i)-(l).

Likely causes: Schools not informing the Ministry that the increment is due. It was noted that increment notification happens automatically for teachers but not for support staff in schools and this could be a source of confusion. Where schools are not undertaking performance appraisals, this will be a contributing factor because notification for an increment has not been triggered. The ability for notification of increment dates for all staff (which could be linked to performance appraisal) would assist in removing this confusion.

Effect: Employees not receiving the pay they are due, or not receiving it in a timely manner.

Size of the issue: Indicative data for the larger support staff occupational groups suggests there are more support staff not receiving their increments than is explainable by legitimate reasons.

To size this issue, analysis was undertaken of support staff in administrative positions (executive / clerical, school secretaries and typists) and teacher aides. Analysis focused on union members as they are all employed on the Support Staff in Schools' Collective Agreement and therefore should be receiving incremental steps (subject to their performance and not being at the maximum step for their grade).

The nature of individual employment agreements for non-union members and whether they are entitled to annual increments are not known and therefore they were excluded from the analysis.

A total of 3,100 staff were identified as having been employed in the same position over an 18 month period and were all paid at the rate specified in the collective agreement (i.e. were not paid above the minimum rates). Of these staff around 900 were already at their grade maximum and so were not eligible for an annual increment. The remaining 2,200 staff should have received an annual increment subject to satisfactory performance. However, 530 of these staff did not receive an annual increment. This represents 24 percent of staff eligible to receive an increment (or 17 percent of all staff analysed).

Outcome sought: Support staff receive their incremental steps they are entitled to when they are due.

Recommended actions, by whom and timeframe:

(a)   Provide guidance to employers and employees about increment provision and process required. [NZSTA and unions, ongoing]

(b)   Find the means of providing automatic alerts to schools regarding the due date for incremental step including the need for performance appraisal. [Ministry of Education, for implementation in 2009]

(c)   Investigate viability / feasibility of automatic increments. [Ministry of Education during 2008]

5.5 Issue 2: Support staff – inconsistent grading and placement on scales and steps (Rewards)

Key Finding: A concern was raised at the support staff focus group about 'teacher aides being wrongly graded' and reports to NZEI Te Riu Roa (which represents member support staff) suggest that some support staff are placed on inappropriate scales and grades. NZSTA have also raised this issue as they consider the wording of grades is inappropriate. A recent employment court case (*The Red Beach School Board of Trustees v The Attorney-General in Respect of the Secretary for Education, AC 13/07*) found that a group of teacher aides at that school had been inappropriately graded has also highlighted the issue concerning grades.

Likely causes:
- Unclear definitions of support staff scales and grades in the Support Staff in Schools' Collective Agreement
- Employees who may have been correctly placed initially, but changed the nature of the work they do since then, and
- Employers and employees may have differing expectations as to where employees fit into the support staff pay scale.

Effect: If a person is incorrectly placed on the Associate rather than the Administration (under the Support Staff in Schools' Collective Agreement) scale their ability to progress salary steps with increased experience is more limited. Where the grade is inappropriate, this will affect the pay rate. Since teacher aides are part of a highly female dominated occupational group, any inappropriate placement of scale and/or grade could cause barriers to pay and advancement for women.

Size of the issue: Impossible to size.

Outcome sought: All support staff covered by the Support Staff in Schools collective Agreement to be on appropriate scales and grades.

Recommended actions, by whom and timeframes:

(a)   Develop clearer definitions and criteria for classification of grades and scales. [Support Staff Remuneration Working Party, by 1 September 2008]

(b)   Refer clearer definitions and criteria for support staff grades and scales to the next round of bargaining. [Parties to the collective agreement, 2009]

(c)   Provide agreed guidance and advice to employers and employees on clearer definitions and agreed criteria. [NZSTA and the Ministry of Education and NZEI Te Riu Roa, ongoing]

(d)   Improve collection and recording of information from schools on grades, scales and steps of all support staff (including steps for people on non standard pay rates) to assist future analysis. [Ministry of Education, commencing September 2008]

5.6   Issue 3: Cleaners – work may not be valued appropriately (Rewards)

Key Findings: Cleaners have specific pay and employment issues that result in:
▪   Low pay
▪   Pay being inequitable
▪   The undervaluing of roles and responsibilities
▪   Invisibility in the workplace, and
▪   Lack of access to, and support in, training and professional development.

Cleaners normally work during the school year which can vary in length from year to year, but is usually between 38 and 40 weeks.

The Caretakers and Cleaners' (including Canteen Workers) Collective Agreement provides for a minimum rate of $11.79 per hour (although the minimum hourly rate currently being paid is $12.00 in line with minimum wage legislation). Note that this collective expired 30 September 2007 and is currently in bargaining.

As at February 2008, 15 percent of union members, and 33 percent of non-union members were paid above the collective agreement rate. The remainder are at the minimum rate of the collective agreement or below.

During the pay and employment equity review, support staff reported:
▪   Over half of the support staff focus group agreed that 'women's work' was undervalued (Support Staff Focus Group)
▪   There is a feeling amongst some support staff that there are not equitable rewards for support staff (School Review Report)
▪   "The overall attitude towards support staff seems to be of undervaluing them, their work and on a personal basis" (School Review Report).

Effect: It is possible that the work undertaken by cleaners in the compulsory school sector is undervalued because of historical gender bias.

Likely causes: The likely causes for cleaners represent most of the characteristics of female dominated occupations such as:
▪   High incidence of casual and part-time work
▪   Lack of job security
▪   Work traditionally seen as "women's work e.g., nurturing, cleaning
▪   Low pay
▪   Lack of recognition of roles and responsibilities or contributions to school environment
▪   Limited access to, or support of, professional development and training;
▪   work is undervalued, and
▪   Historically pay rates are not set on basis of skill, knowledge and/or responsibility.
The steering group is not aware of any objective job value assessment being done recently to set a value on the work done by cleaners.

Size of issue: As at February 2008 the number of cleaners employed by boards of trustees was 3,072 of which, females make up 77 percent of this group. The average cleaner is employed for 0.4 FTTE per week and 20 percent of the sector are unionised.

Outcome sought: To investigate the value of the work undertaken by cleaners in the compulsory school sector.

Recommended actions, by whom and timeframes:

(a)   Conduct a pay investigation for cleaners to determine if the job is evaluated fairly in terms of remuneration. [The Ministry of Education will manage the pay investigation, and will consult with education sector unions and NZSTA to develop the terms of reference; commencing September 2008]

5.7   Issue 4: Teacher Aides – work may not be valued appropriately (Rewards)

Key Findings: Teacher aides have specific pay and employment issues that result in:
- Low pay
- Pay being inequitable
- The undervaluing of roles and responsibilities
- Invisibility in the workplace and
- Lack of access to, and support in, training and professional development.

This group are employed across secondary, area and primary sectors and normally work during the school year which can vary from year to year, but is usually between 38 and 40 weeks in length. The majority do not get paid during school term breaks.

The collective agreement (which is a minimum rate document) provides for rates of pay. MOE payroll data (2008) shows almost all (91 percent) of teacher aides are employed on the Associate pay scale, with 52 percent being employed on grade B of this scale.

During the pay and employment equity review, it was reported that:
- Over half of the support staff focus group agreed that 'women's work' was undervalued. A quarter of this group were teacher aides (Support Staff Focus Group).
- There is a feeling amongst some support staff that there are not equitable rewards for support staff (School Review Report).
- "The overall attitude towards support staff seems to be of undervaluing them, their work and on a personal basis" (School Review Report).

Effect: It is possible that the work undertaken by teacher aides in the compulsory school sector is undervalued because of historical gender bias.

Likely causes: The likely causes for teachers aides represent most of the characteristics of female dominated occupations such as:
- High incidence of part-time work; casualisation
- Lack of job security
- Work traditionally seen as "women's work e.g., nurturing, cleaning
- Low pay
- Lack of recognition of roles and responsibilities or contributions to school environment
- Limited access to, or support of, professional development and training
- work is undervalued, and
- Historically pay rates are not set on basis of skill, knowledge and/or responsibility.

The steering group is not aware of any objective job value assessment being done recently to set a value on the work done by teacher aides.

Size of issue: As at February 2008 the number of teacher aides employed by boards of trustees was 12,390 of which females make up 90 percent of this group. Most teacher aides are part-time. On average teacher aides are employed at 0.5 FTTE with only 13 percent being employed at 0.8 FTTE or above.

Outcome sought: To investigate the value of the work undertaken by teacher aides in the compulsory school sector.

Recommended actions, by whom and timeframe:

(a)   Conduct a pay investigation for teacher aides to determine if the job is evaluated fairly in terms of remuneration. [The Ministry of Education will manage the pay investigation, and will consult with education sector unions and NZSTA to develop the terms of reference; commencing September 2008]

5.8   Issue 5: Support staff and teachers – unjustified use of fixed-term agreements (Rewards)

Key Finding: Reports to unions suggest unjustified use of fixed-term agreements for some support staff and teachers. For example they report that some teachers new to the profession, or new to the country may be employed on fixed term agreements as a type of trial period.

Noted that some use of fixed term is justified e.g., parental leave, Ongoing Renewable Resourcing Scheme (ORRS) funded teacher aides where the funding by its nature is short to medium term. This funding follows the child with special needs and is therefore not guaranteed to the school from one year to the next.

Likely causes: Lack of awareness / understanding of legal requirements under the Employment Relations Act 2000. Uncertainty over funding.

Effect: Unjustified lack of employment security for employees.

Size of issue: Impossible to size.

Outcome sought: All use of fixed term agreements reflect current contractual and legislative requirements.

Recommended response:

(a)   Provide guidance to employers about fixed term agreements [NZSTA, ongoing]

(b)   Provide advice to employees re legal entitlement with regard to fixed term [unions, ongoing]

(c)   Explore the size of the issue for support staff and funding arrangements (including sufficiency of funding) that lead to the use of unjustified fixed term positions [Ministry of Education commencing February 2009]

(d)   Encourage permanent arrangements for those core Ongoing Renewable Resource Scheme (ORRS) funded teachers aides who work in a sizeable group of teacher aides each year in some schools. [By NZSTA / NZEI Te Riu Roa and supported. Ministry of Education, by February 2009]

5.9   Issue 6: Teachers – gender disadvantage for women teachers and principals in career advancement (Rewards)

Key Finding: 2006 Ministry of Education payroll analysis shows that women teachers and principals:
▪   Are less likely to hold mid and senior management roles (with same experience and qualification levels)
▪   Advance to higher positions more slowly than men
▪   When holding units, tend to hold fewer
▪   Are less likely to hold a principal position, and
▪   Are less likely to be in a higher paying primary principal role.

Likely causes: Women choosing not to apply for management roles or for principal positions in larger schools for work-life balance reasons; perceived barriers to appointment of part-time teachers who are predominantly women to positions of responsibility; lack of mentoring for women seeking to advance their career; informal and non-transparent appointments to 'acting up' roles which provide useful experience for advancement; gender biased appointment processes; perceived preference for men's management styles.

Effects:
▪   Women teachers as a group are paid lower than men
▪   Women having less say in management of schools
▪   Sector misses out on women's perspective and attributes in management positions, and
▪   Gender biased role models for students.

Size of the issue: Across all school types, women are less likely than men to hold senior management positions. Analysis of payroll data for 2006 shows 22 percent of women are in middle management positions compared to 28 percent of men and three percent of women are in senior management positions compared to six percent of men.

The steering group also considered whether the lower rates of advancement for women were a consequence of other factors such as years of experience or qualifications. Analysis controlling for these factors showed that women were still less likely to advance than men and this advancement was likely to be slower than for men.

Women, when they do hold units are likely to hold fewer units then men. Of those teachers who hold units, 45 percent of women hold two or more units compared to 61 percent of men.

Women are much less likely to become principals then men. Men teaching in primary schools are more than five times more likely to become principals than women. In secondary and composite schools men are more than three times more likely to become principals than women. In special schools men are four times more likely to become principals than women.

Outcome sought: No gender barriers to advancement of women.

Recommended actions, by whom and timeframe:

(a)   Include pay and employment equity policies and processes into Ministry of Education policy development that impacts on schools [Ministry of Education, ongoing]

(b)   Explore having specific pay and employment equity role within the Ministry of Education to provide a gender lens. This role could encompass the promotion, development and monitoring of PAEE policies and programmes in the education sector [Ministry of Education, by June 2009]

(c)   Provide access to expert advisory service on employment equity issues to:

   (i)   Participate in, attend or advise boards appointing a principal

   (ii)   Provide employment equity training for boards of trustees prior to appointing a principal

   (iii) Provide free expertise if required

   (iv) Ensure boards of trustees know how to access expertise.

[Ministry of Education after discussion with tripartite group members[24]].

Note: one way of enacting recommendation (c) (i) could be through a government appointee as in some jurisdictions outside New Zealand this has appeared to make a difference to addressing employment equity issues in relation to the appointment of principals. However, in New Zealand such provision would be outside the current self managing governance model of boards of trustees. Any such possible change would therefore require extensive consultation with the sector, as well as Government support through policy and legislative change.

(d)   Provide employment equity training for principals, in relation to appointment processes for staff. [NZSTA, unions ongoing]

(e)   Include gender equity in NZSTA / union employment education courses. [By NZSTA / unions, commencing 2009]

(f)   Monitor pay and employment equity policies and processes in schools to determine the extent to which gender equity issues are being addressed, including appointment processes relating to the progression of women teachers through management positions to principalships. [Ministry of Education, 2009]

(g)   Design career related professional development specifically for women e.g. within programmes such as Aspiring Principals and Kiwi Leadership [Ministry of Education by December 2008]

(h)   Support the establishment of a mentoring programme for women aspiring to careers in management in schools. [By Ministry of Education / NZSTA / unions, by June 2009]

(i)   Develop resources to encourage and assist employers to consider appointing part-time teachers to positions of responsibility. [NZSTA in consultation with unions commencing October 2008]

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[24] Note that the tripartite group parties could not reach an agreed statement on the process that would be undertaken by the Ministry prior to the Ministry making a decision on recommendation (c).

5.10 Issue 7: Teachers – inequitable provision of classroom release time or non-contact time for part-time teachers (Rewards)

Key Finding: Part-time teachers, who are predominantly women, lack equitable access to classroom release time and non-contact time compared with full-time teachers.

In the primary sector, part-time teachers who work 0.8 and above have an entitlement to proportional classroom release time to full-time teachers who are entitled to 10 hours per term. Those who work less than 0.8 have no contractual entitlement to classroom release time.

In the secondary sector, part-time teachers have a limited entitlement to non-contact time[25]. Those working more than 0.72 are entitled to some non-contact time. They also get additional non-contact time for holding units (one hour per unit up to a maximum of three units). Employers are required to endeavour to provide proportional non-contact time for part-time teachers working between 0.48 and 0.89.

In area schools part-time teachers teaching 0.72 and above who teach 80 percent of classes across years 7-13 have similar non contact time as those in secondary schools, but area schools need not endeavour to provide proportional non contact time. Part-time teachers predominantly teaching years 1-7 who are employed for 0.8 FTTE or more have a maximum teaching classload of 0.96 of time employed**.**

Effect: Some part-time teachers have less or no provision for classroom release or non-contact time for preparation, assessment, administrative duties and providing pastoral care to students.

Likely causes: Provisions as in collective agreements.

Size of issue: Payroll data shows that in 2006, 18 percent of women teachers and 5 percent of men teachers in the primary sector worked less than 0.8 and therefore had no contractual entitlement to classroom release time. This equates to approximately 4,000 women and 250 men who potentially are not receiving any classroom release time (although individual schools may have opted to provide classroom release time to all teaching staff).

In the secondary sector, ten percent of women teachers and six percent of men teachers worked less than 0.48 and therefore had no contractual entitlement to non-contact time. This equates to approximately 1,100 women and 500 men who potentially are not receiving any non-contact time. A further 1,300 women (12 percent) and 400 men (five percent) work between 0.48 and 0.89 for whom the school is required to endeavour to provide proportional non-contact time. The extent to which these teachers receive proportional non-contact time is unknown. A minimum amount of non-contact time is stipulated for those working between 0.72 and 0.89. Teachers working 0.9 and above are considered full time.

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[25] There is however an entitlement to what is referred to as an 11% loading. The hours a part time teacher is paid for is the sum of their contact and non-contact hours (where applicable). This sum is increased by 11% before payment, with the additional being paid to part time teachers in recognition of their share in the activities of the school which are outside classroom teaching hours.

It is not possible to quantify the number of teachers affected in the composite sector as payroll data does not identify the year levels of classes that teachers teach.

Outcome sought: Equitable provision of classroom release time and non-contact time for part-time teachers.

Recommended actions, by whom and timeframes:

(a) Refer equitable provision of classroom release time or non contact time with full time teachers for part-time teachers to the next bargaining rounds for teachers in each sector. [Parties to the collective agreements]

5.11   Issue 8: Support staff – the ineligibility for annualised pay experienced by fixed term employees (Rewards)

Key Finding: Fixed term support staff under the current Support Staff in Schools' Collective Agreement are ineligible for annualised pay, whereas permanent employees under the same collective agreement have had this facility (union members since 2007 and all employees since 2008).

Cause: Annualisation of pay has been recently introduced for permanent employees only.

Effect: Fixed term support staff are generally not employed over the long summer break, and not being able to 'smooth' pay from the period of their employment can make budgeting over this period difficult for the employee.

Size of the issue: Affects all those on fixed term agreements who might opt for annualised pay. There are a number of Ongoing Renewable Resource Scheme funded teacher aides who are employed on a fixed term agreement on a year by year basis who would find their pay being annualised of benefit. Analysis of payroll data shows that around 13 percent of all administrative staff and teacher aides have opted for annualised pay. This is an understatement as it includes fixed term staff that are not eligible for annualisation, but it is not possible to identify those on a fixed term agreement. Clearly though this shows that annualisation has been a useful option for a number of staff.

Outcome sought: Introduction of facility for fixed term employees to have their pay annualised. Note – discussions have occurred to determine a sensible length of fixed term employment to seek this outcome.

Recommended actions, by whom and timeframes:
(a)   Refer the extension of annualisation to fixed term employees who are employed for the school year or longer to the next bargaining round. [Parties to the collective agreement in 2009]
(b)   Investigate means of extending the principles of annualisation to all employees employed for less than the school year. [Parties to the collective agreement at a future bargaining round]

5.12 Issue 9: Support staff – effect of break in employment on service entitlements (Rewards)

Key Finding: Under the current Support Staff in Schools' Collective Agreement a break of employment of more than three months results in loss of entitlement to sick leave accumulation, additional annual leave after five years service and service calculated in cases of redundancy.

Similar conditions are experienced by therapists, caretakers, cleaners and canteen workers (with some minor differences applying to the latter three groups).

Comparison with teachers is that accumulated sick leave is protected (no time limit); all service and child-care credit counts in calculation for severance payments.

Likely causes: Collective agreement provisions.

Effects:
▪ Support staff have fewer entitlements compared to other groups which contributes to the sense of being undervalued
▪ Provides a barrier for support staff to take time off to improve qualifications, and
▪ Retention of support staff who have taken a break is not assisted.

Size of issue: Affects all support staff with breaks in employment of more than three months.

Outcome sought: Service entitlements equitable to comparable groups within the education sector.

Recommended actions, by whom and timeframes:

(a) Refer equitable service entitlements for support staff with respect to effects of breaks in employment to the next bargaining round. [Parties to the collective agreement, 2009]

5.13 Issue 10: Support staff - effect of absence for child care on service entitlements (Rewards)

Key Finding: Absence for child-care, other than parental leave, for more than three months breaks service for support staff. This is inequitable compared to teachers. Where service is interrupted but not broken. Teachers are entitled to one third credit of the total time away from teaching in order to care for their own children which is credited as service.

Effects:
- Break of more than 3 months for child-care results in loss of service provisions
- Sense of being undervalued, and
- Women are not encouraged back into workforce after break for child-care.

Likely causes: Lack of provision for child-care breaks in collective agreement.

Size of issue: Affects all support staff with breaks of more than 3 months for the purpose of child-care.

Outcome sought: Service entitlements for child-care breaks equitable to comparable groups within the education sector.

Potential barrier/risks: Potential costs arising from the contingent liability for sick leave, redundancy and other service entitlements.

Recommended actions, by whom and timeframes:

(a)   Refer equitable service entitlements for support staff with respect to effects of absence for child care to the next bargaining round. [Parties to the collective agreement, 2009]

5.14 Issue 11: Support staff – lack of clarity about work expectations and whether that work is paid (Participation)

Key Finding: Some support staff reported (through school review reports) that they can be expected to work longer hours to attend school functions, trips, meetings etc. Reports to the unions also suggest that some support staff were expected to work beyond their normal hours including some not being paid for their time.

Effect:
- Undertaking work without pay, and/or
- Confusion for employers/employees about work expectations.

Likely causes:
- Some Ongoing Renewable Resource Scheme funded teacher aides are expected to attend individual education programme meetings in an unpaid capacity. The current Ongoing Renewable Resource Scheme funding system pays the teacher aide only for time with the child and funding for other hours must come out of their operational grant or other funds.
- For other support staff, lack of communications with their managers, or lack of clarity in job descriptions can lead to misunderstandings about expected workload.
- Employers and/or employees not being clear on the role of the aide as either an employee or a 'volunteer'.

Size of issue: Not possible to size.

Outcome sought: Support staff are clear about expectations for attendance at meetings, functions or trips that are relevant and linked to their job, and are clear about whether these are on a paid basis or not.

Recommended actions, by whom and timeframes:

(a) Encourage employers to ensure support staff job descriptions are clear and comprehensive and that the expectations on support staff employees are clearly communicated. [NZSTA/NZEI Te Riu Roa, commencing September 2008]

(b) Provide clear and transparent guidelines from employers to employees about activities that fall within paid work time by employers. [NZSTA in consultation with NZEI Te Riu Roa commencing September 2008]

5.15 Issue 12: Support staff and teachers – domestic and sick leave provisions (Participation)

Key Finding: The results from the first survey indicate that support staff use leave without pay more frequently than teachers to care for family members; and that women in both support staff and teachers' groups use leave without pay more frequently than men.

A school review report noted that: "Lack of sick leave to look after children is a gender equity issue for support staff."

Reports to unions indicate that women teachers use more of their sick leave for domestic leave purposes than men, but this has not been able to be analysed through the payroll data.

Effect:
- Those who use up their sick leave for domestic reasons then lose pay and/or come to work when sick, and
- When leave without pay is taken, there are negative effects on holiday pay and having a liveable wage.

Likely causes: The limits on amount of domestic leave which may be offset against a proportion of sick leave for support staff.

Support staff can use eight days / year for domestic leave from accumulated sick leave (they receive seven days per year sick leave) compared to public service where 10 days sick leave is the norm and all can be used for domestic leave.

While teachers' sick and domestic leave provisions are more generous than for support staff, the nature of the issue remains the same. For both groups more women than men use their sick leave as domestic leave and so exhaust their sick leave entitlements more often and earlier than men.

Size of issue: Results from the first survey from a total of 193 support staff showed that 41 percent of the support staff had then time off to care for children or family members within the last 12 months, with 25 percent of the respondents having taken leave without pay. Of the 297 teachers who responded to the survey, 34 percent had taken time off in the last 12 months to care for children or family members. Twenty percent of these teachers had taken at least one period of leave without pay. This issue was not included in the supplementary perception survey.

Gender comparisons based on teachers' responses from 188 women and 109 men; and on support staff responses from 156 women and 37 men showed that:

- Teachers: ten percent of women compared with 3.7 percent of men had taken leave without pay to care for family members; and
- Support staff: 12 percent of women compared with 2.7 percent of men had taken leave without pay to care for family members.

Outcome sought: Ability of staff to be able to utilise appropriate paid leave to care for dependents.

Recommended response:

(a)   Investigate means of providing fair sick and domestic leave provisions for support staff and teachers and refer to the next bargaining rounds. [Parties to the collective agreements by 2010]

(b)   Consider discrete domestic leave provisions for support staff and teachers as part of the above investigation. [Parties to the collective agreements by 2010]

5.16 Issue 13: Support staff – lack of access to professional development for some employees (Participation)

Key Finding: School review reports and staff experience and perception survey results indicated that significant numbers of support staff did not receive good levels of relevant professional development. For cleaners, the lack of access to qualifications which are externally based affects their pay.

Effects:
- Barrier for support staff to do their job adequately and to advance in their skills, knowledge and career, and
- Lack of access to the externally based industry training organisation qualifications, by cleaners, affects their overall pay by one or two percent.

Likely causes: Barriers to taking up professional development opportunities as reported in the first survey:

No opportunities offered (16 percent); family responsibilities (12 percent), no professional development plan (11 percent) and costs to school (ten percent) or costs to the individual (ten percent).

Where professional development had been undertaken 31 percent reported that their new skills gained were not recognised in any way.

Ability to access courses is also a likely cause.

Size of issue: Results from the first survey indicate significant numbers of support staff did NOT agree that they:
- Were provided with good opportunities for professional development (24 percent in initial survey and 31 percent in second survey)
- Had sufficient professional development opportunities so they could do their job (20 percent)
- Were encouraged to participate in activities that would help their professional development needs (17 percent)
- Had agreed on a professional development plan with their manager in the last 12 months (42 percent in initial survey and 24 percent in second survey)
- Had undertaken some form of professional development in the last 12 months (11 percent).

Findings were similar for the questions posed in the second survey (percentages of those who did not agree with the statements are included above in points 1 and 4). These percentages were based on average of 180 responses in the first survey questions and 106 responses for the second survey questions.

School review reports comments from three schools are below:
- "Not a lot of access for support staff to relevant training";
- "Degree of secrecy about availability of training and who gets what"; and
- "Support staff professional development becomes difficult due to family commitments and staff meetings being outside support staff working hours."

Outcome sought: All support staff receiving good levels of quality relevant professional development.

Recommended response:

(a)   Increase awareness of employers about professional development options available to support staff. [NZSTA, ongoing]

(b)   Encourage tertiary providers to offer courses and programmes that are relevant and accessible to support staff, and where possible these courses and programmes should lead to qualifications. [Unions, NZSTA and Ministry of Education, ongoing]

(c)   Encourage support staff to inquire about professional development needs. [PSA / SFWU / NZEI Te Riu Roa, by May 2009]

(d)   Recommend school employers link performance management with professional development needs. [NZSTA, ongoing]

(e)   Encourage boards of trustees to consider the needs of all support staff when setting their professional development budget. [NZSTA, ongoing]

(f)   Refer the issue existing in the Caretakers and Cleaners (including Canteen Workers) Collective Agreement between payment available for service or for qualification but not both to the next bargaining round. [Parties to the collective agreement]

(g)   Explore ways that support staff can access funding for professional development. [Ministry of Education/NZSTA, ongoing]

5.17 Issue 14: Support staff – lack of ability to contribute influence and advice (Participation)

Key Finding: Some support staff have significant barriers to having their voice heard within the school. Findings of school review reports, focus group discussions, and the first survey suggest that while some support staff are included in school decision making, are consulted and are able to contribute their influence and advice, this is not a universal experience for support staff.

Likely causes:
- Cost to school in releasing some support staff from their jobs to attend meetings, meetings held outside support staff working hours creating cost to school if paying them and/or difficulties for the support staff employee with other responsibilities e.g. family,
- School management not aware that some decisions impact on support staff and that their view is needed,
- Focus in some schools more on teachers than support staff, and
- School processes that unintentionally place barriers in the way of support staff contributing their influence and advice.

Size of issue: Unable to be measured.

Effects:
- Disenfranchised disaffected employees, and
- School misses out on support staff perspective.

Outcome sought: Support staff feel valued and included in whole school discussions and decision making, and are able to make their 'voice heard'.

Recommended actions, by whom and timeframe:

(a) Disseminate good practice examples to employers of how to encourage and support contributions from support staff. [Ministry of Education and NZSTA, commencing September 2008]

(b) Empower support staff members to participate in school communities. [Unions, ongoing]

(c) Promote inclusion of support staff in developing relevant policies and practices and informing decision-making within the school. [Ministry of Education / unions / NZSTA, commencing September 2008]

(d) Increase visibility of support staff in documents and material produced e.g. communications and policies. [Ministry of Education / unions / NZSTA, ongoing]

5.18   Issue 15: Women teachers – lack of ability to contribute influence and advice (Participation)

Key Finding: Findings in the supplementary perception survey showed that in the teaching sector significantly more women than men were not confident that:
- Their views were considered fairly by managers and colleagues
- Processes were in place to put professional issues to the board of trustees, or
- That they received feedback on meetings they could not attend. The gender differences were more marked in the secondary teaching responses indicating women in that sector have more concerns about being heard and receiving information.

Effects:
- Women's views not heard
- Women may feel undervalued and less confident in workplace, and
- Decisions are made without full consideration of everyone's views.

Likely causes:
- School processes that unintentionally place barriers in the way of teachers contributing their influence and advice
- Some school cultures where there is little respect for diversity of views, and
- Some senior leadership teams who may not recognise there are issues for women in their school with regards to having a voice or may not see it as a priority.

Size of issue: Responses to the supplementary survey questions from an average of 286 women and 131 men showed the following:

- Their views were considered fairly by managers and colleagues.
  Overall: 26 percent women disagreed this was the case compared with 15 percent men.
  Secondary sector 32 percent women disagreed compared with 16 percent men.
  Primary sector: 16 percent women disagreed compared with eight percent men.

- There were processes in place to put professional issues to the board of trustees.
  Overall: 27 percent women disagreed compared with 17 percent men.
  Secondary sector: 31 percent women disagreed compared with 19 percent men.
  Primary sector: 17 percent women disagreed compared with eight percent men.

- They received feedback on meetings they couldn't attend.
  Overall: 25 percent women disagreed compared with 17 percent men.
  Secondary sector: 31 percent women disagreed compared with 18 percent men.
  Primary sector: 14 percent women disagreed compared with seven percent men.

Note – gender differences from the initial first survey on these issues were all less than five percent. That survey included a lower proportion of responses from secondary teachers.

Outcome sought: All teachers:

- Are confident their views are considered fairly
- Have access to processes to put professional issues to the board of trustees, and
- Receive feedback on meetings they can not attend.

Recommended actions, by whom and timeframe:

(a)   Develop and disseminate joint guidelines on inclusive policies and employee engagement surveys and encourage and assist their use in schools to enable staff to fully participate. [NZSTA and unions in 2009]

(b)   Include guidelines in management training and courses for new principals. [Ministry of Education, NZSTA and Unions 2009]

5.19   Issue 16: Support Staff – lack of clear job descriptions and performance management processes for some employees (Respect and Fairness)

Key Finding: Support staff as a group experience more barriers/ have more issues in relation to performance management than teachers in schools. They are less likely than teachers to have up-to-date job descriptions, or be clear about what was in their job description. Some reported that they did not have opportunities to renegotiate their job description, and not all positions were appraised against their job description.

*Effects: L*ack of clarity in roles and lack of professional development linked to needs of the role contribute to lack of employee voice and to incremental steps delayed or not received (related issues 1, 2 and 13).

Likely causes:
▪   Lack of management training on performance management
▪   Poor management practices, and
▪   Lack of understanding of rights as employees.

Size of issue: The first survey results from 191 support staff and 292 teachers showed support staff are less likely than teachers to have up to date job descriptions and to have opportunities to negotiate changes to their job description (28 percent of support staff did not have job descriptions compared with 18 percent of teachers). Confidence levels that support staff performance was fairly assessed or that they received honest and frank feedback on performance were also lower than teachers (10-11 percent disagreed compared with six - seven percent for teachers).

Support staff in secondary schools were much less confident about all aspects of performance management than their primary counterparts, particularly with regards to receiving honest and frank feedback on their performance (21 percent secondary support staff disagreed compared with five percent of primary); having opportunities to negotiate changes to their job description (34 percent secondary disagreed compared with 17 percent primary); and being confident that their performance was fairly assessed (16 percent of secondary compared with eight percent of primary). Responses were received from 59 primary support staff and 69 secondary.

Five of the nine school review reports also identified specific concerns about this aspect of employment mentioning support staff in particular:
▪   "Some support staff are not able to negotiate changes to their job description"
▪   "Not all support staff are appraised against their job description'
▪   "Teacher aides are not clear about their job description"
▪   "16 percent of all staff (including teachers) do not consider the appraisal system to be fair", and
▪   "Some support staff are awaiting their performance review".

Note - this issue was not included in the supplementary perception survey.

Outcome sought: Clear, comprehensive job descriptions provided for all staff**.** Robust, constructive performance appraisal that occurs for all staff in a timely and professional and consistent manner.

Recommended actions, by whom and timeframes:

(a)   Explore why the current guidelines are not leading to greater improvements and adjust advice if required. [NZSTA and NZEI Te Riu Roa, by December 2008]

(b)   Use the automatic alert regarding incremental step (refer issue 1 above) to include need for performance appraisal for implementation in 2009. [Ministry of Education]

(c)   Provide information to employers regarding what should be supplied to new staff as part of their induction. [NZSTA, ongoing]

5.20   **Issue 17: Support staff and teachers – bullying, harassment and discrimination (Respect and Fairness)**

Key Finding: Supplementary perception survey results showed significant numbers of support staff and teachers reported that:
- They did not have the opportunity to be involved in policy development
- Harassment policies were not adequately promoted, and
- The school didn't deal appropriately with cases of bullying, harassment and discrimination.

Some staff from both groups reported that their school did not have a policy on the prevention of bullying, harassment and discrimination.

Effects:
- Negatively affects health and safety and wellbeing of employees, and
- Anecdotal evidence of teachers leaving profession (unions).

Likely causes:
- Some school cultures where issues not understood and/or acknowledged
- Lack of effective policies and procedures, and
- Employees reluctant / afraid to raise issue.

Size of issue: Supplementary perception survey results showed significant numbers of support staff and teachers had concerns and reported that:
- They believed their school did not have a policy in bulling, harassment and discrimination (14 percent of support staff and 19 percent of teachers)
- They did not have opportunities to be involved in policy development (42 percent of support staff and 32 percent of teachers)
- They did not believe the policy was sufficiently promoted in their school (37 support staff and 46 percent of teachers), and
- They believed their school did not deal fairly and appropriately with cases of bullying, harassment and discrimination. (32 percent of both support staff and teachers)

These percentages are based on responses from an average of 94 support staff and 393 teachers.

Differences were evident between responses of primary and secondary teachers indicating more of a concern in the secondary sector. In particular:
- More secondary teachers (21 percent) than primary teachers (ten percent) had no knowledge of policies existing in their school, and
- More secondary teachers (36 percent) than primary teachers (19 percent) believed their school did not deal fairly and appropriately with cases of bullying, harassment and discrimination.

These numbers show this is a significant issue for staff in both primary and secondary sectors.

Significantly more women than men were concerned about promotion of policies and how the school dealt with cases of bullying, harassment and discrimination. In secondary teachers (where the number of responses made gender comparisons possible), 51 percent of women and 39 percent of men did not agree that the policy

was sufficiently promoted in the school; and 44 percent of women and 23 percent of men did not agree that the school dealt appropriately with these issues when they arose.

Note – Only one question was posed in relation to these matters in the first survey. Results were that 13 percent of support staff and 15 percent of teachers in those schools did not agree that the school dealt appropriately with cases of bullying, harassment or discrimination. School review committees tended to focus on whether a policy existed or not, and all schools had such a policy.

Outcome sought: A safe respectful working environment for all. Assists with retention and recruitment of staff. Environment which fosters improved learning outcomes.

Recommended actions, by whom and timeframe:

(a)   Promote the use of surveys in schools and for the survey to include questions about prevention of bullying, harassment and discrimination. [NZSTA, 2009]

(b)   Develop and disseminate guidelines and examples of surveys to boards of trustees for principals and staff. [NZSTA/unions, commencing 2009]

(c)   Include or provide guidelines and resources in management training and first time principals' courses. [NZSTA/Unions/Ministry of Education, commencing 2009]

(d)   Provide best practice guidelines and resources regarding work-place bullying and student behaviour. [NZSTA/Unions/ Ministry of Education, commencing 2009]

6.0 Appendices

6.1   Steering Group Terms of Reference and membership

6.2   Plans and Tools used

6.3   Compulsory Schooling Sector demographic information

6.4   Staff Experience Survey (1st survey)

6.5   Supplementary Online Perception Survey (2nd survey)

6.6   Principals Focus Group Questions and Survey

6.7   References

6.1   Tripartite Steering Group Terms of Reference and Membership

1.   The Purpose of the Tripartite Group

To develop the strategy and programme for the Pay and Employment Equity review process in the compulsory school sector.

Background
In March 2004 the Taskforce on Pay and Employment Equity in the Public Service and the Public Health and Public Education Sectors reported its findings. The Taskforce developed an action plan focusing on addressing the gender pay gap in the state sector. The principle of the action plan is to ensure that in the state sector pay is not affected by gender and that both women and men have access to all jobs, with gender or gender-related expectations not standing in the way of job choice and job progression.

In 2004 Cabinet agreed to a Plan of Action for Pay and Employment Equity by adopting many of the Taskforce recommendations. The mechanisms for giving effect to Government commitment include completing pay and employment equity reviews and developing response plans.

Definitions
The Pay and Employment Equity Taskforce has defined:
Employment equity as meaning the elimination of barriers to equality for women in employment. It involves implementing gender neutral policies and practices in access to employment opportunities, and in terms and conditions of employment including pay.

Pay equity as meaning that women receive the same pay as men
▪   For the same work and
▪   For work which is different, but of equal value.

Please note that the Audit is now referred to as a Review.

2.   Membership of Tripartite Group

Ministry of Education (Chair)
NZ School Trustees Association, NZSTA
Post Primary Teachers Association, PPTA
NZ Educational Institute, NZEI Te Riu Roa
Service and Food Workers Union, SFWU
Public Service Association, PSA
In attendance:
DoL Pay and Employment Equity Unit representative
Project Coordinator

3. The Role of the Tripartite Group

- Plan process
- Identify support required
- To design a representative sample of schools to conduct reviews
- Provide overall coordination of process in schools
- To pilot the audit tool in a small sample of schools before roll out to full sample
- To oversee the review process
- Analyse results
- Develop a response plan.

The purpose of the review is to help identify how gender affects employment in the public education service and to identify areas that are perform well and where there are gender differences that may require further investigation and response.

The review process is a six step process:
1. Creating a gender profile
2. Preliminary analysis
3. Follow up analysis
4. Validation
5. Preparation of audit report
6. Developing a response plan

The Department of Labour Pay and Employment Equity Unit (PEEU) has developed a number of tools to assist organisations with the review process, including a review workbook. The review workbook is designed to assess polices and practices within organisations to enable the development of response plans to address identified barriers to pay and employment equity. Pilots of the pay and employment equity tool were carried out at the National Library and Auckland University of Technology. The primary purpose of the pilot was to test the audit tool [now referred to as the review workbook], specifically to what degree the tool provided a robust method for identifying and addressing pay and employment equity issues. The evaluation of the pilot audit indicated that the audit tool was practical and easily applied and its guidelines and information easily understood. The audit tool is now finalised and will be available as a download on the Department of Labour website towards the end of 2005.

The audit tool will be reviewed and amended for applicability to the education sector.

4. Scope of the work

- The Ministry of Education has overall accountability for developing and reporting on employer mechanisms in relation to reviews and response plans and for reporting progress on a regular basis.
- The tripartite group will develop an overall plan of action.
- The tripartite group will identify information and data required for the review, including the identification of any data gaps.
- The tripartite group will design and develop a representative sample of schools to conduct the review in the compulsory education sector.

- The tripartite group will develop a communications plan for the sector.
- The tripartite group will identify the needs of participant schools and support required in order to build capacity to maximise quality participation in the review.
- The tripartite group will report to the Secretary for Education the results of the review.
- The tripartite group will prioritise the areas that need to be responded to by analysing the data and developing criteria that allows focus on key areas to ensure real and manageable change can occur.
- The tripartite group will develop an agreed response plan for those identified gender-differences in outcomes that are not explainable or justifiable.
- The response plan will be reported to the Minister of Education by the Ministry of Education in consultation with the Pay and Employment Equity Unit for referral to the Ministerial Reference Group.

6.2 Plans and Tools Used

1. Project plan.

2. Communications plan.

3. School review committee resource book (includes school review process, staff experience survey, questions for school review committee to investigate).

4. Focus group process.

6.3 Compulsory Schooling Sector demographic information

Actual Teaching Staff (FTTE) in State Schools by School Type and Gender, 1971-2006 (April)

YEAR	Primary			Composite			Secondary			Special			TOTAL		
	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total	Male	Female	Total
1971	6,634	10,902	17,536				5,386	3,775	9,161				12,020	14,677	26,697
1976	7,479	12,021	19,500				6,891	4,123	11,014				14,370	16,144	30,514
1981	6,688	12,043	18,731	274	215	489	7,320	4,816	12,136				14,282	17,074	31,356
1986	5,789	13,514	19,303	307	312	620	7,463	6,298	13,761	119	362	481	13,791	20,752	34,543
1991	4,971	15,064	20,035	287	376	663	7,439	6,974	14,413	91	532	623	12,897	23,232	36,130
1992	4,829	14,938	19767	297	382	679	7,402	6,962	14,364	93	502	594	12,722	23,065	35,786
1993	4,655	14,779	19,434	301	406	707	7,332	7,038	14,369	97	476	574	12,481	22,958	35,439
1994	4,609	15,126	19,735	308	482	790	7,143	7,174	14,317	88	472	561	12,257	23,552	35,809
1995	4,468	15,536	20,003	332	523	855	6,961	7,264	14,225	92	473	565	11,956	24,083	36,039
1996	4,497	16,810	21,307	362	546	909	6,917	7,477	14,394	83	461	544	11,961	25,578	37,539
1997	4,636	17,653	22,289	397	654	1,051	6,904	7,673	14,577	79	423	502	12,116	26,695	38,811
1998	4,667	18,014	22,681	447	711	1,158	6,935	7,728	14,663	78	413	491	12,236	27,170	39,406
1999	4,718	18,139	22,857	478	834	1,312	6,980	7,960	14,940	88	464	552	12,353	27,667	40,020
2000	4,709	18,386	23,095	495	923	1,418	7,068	8,155	15,223	115	541	656	12,466	28,225	40,691
2001	4,690	18,672	23,362	517	968	1,485	7,077	8,297	15,374	138	606	744	12,506	28,778	41,284
2002	4,633	18,725	23,358	547	1,024	1,571	7,072	8,524	15,596	141	622	763	12,467	29,111	41,578
2003	4,610	19,004	23,613	578	1,112	1,691	7,361	9,126	16,486	150	649	799	12,773	30,108	42,881
2004	4,587	18,996	23,583	610	1,185	1,795	7,657	9,622	17,279	168	666	835	13,094	30,683	43,777
2005	4,515	18,842	23,357	689	1,318	2,008	7,894	10,150	18,044	172	737	909	13,336	31,226	44,562
2006	4,472	19,267	23,738	714	1,329	2,042	8,073	10,398	18,471	185	746	931	13,501	31,892	45,393

Notes: FTTE = Full Time Teacher

For 1971, 1976 and 1981 only full-time staff are included.

For 1971, 1976 and 1981 special and correspondence school staff are included in primary.

In 1971 and 1976 composite (area) school staff are included in primary.

Number of School Support Staff by Designation and Gender, July 2006

Staff Type	Designation	Number		Percentage	
		Women	Men	Women	Men
Support Staff	Cafeteria/Hostel	423	12	97	3
	Caretaking	239	1,773	12	88
	Cleaning (Dental Clinic)	5	0	100	0
	Cleaning (General)	2,305	665	78	22
	Executive/Clerical	1,305	248	84	16
	Groundskeeping	42	340	11	89
	Institutional Welfare	194	77	72	28
	Kaiarahi Reo	60	20	75	25
	Kaiawhina	51	16	76	24
	Library	689	17	98	2
	Nursing	86	0	100	0
	School Secretaries	2,778	70	98	2
	Secretaries/typing	624	20	97	3
	Task Force Green Worker	9	9	50	50
	Teacher - Aide/Assistant	13,174	1,353	91	9
	Technical/Trades	265	250	51	79
Total support staff		**22,249**	**4,870**	**82**	**18**

Data source: Teacher Payroll Data Warehouse, Ministry of Education

Total Number of Schools by School Type as at 1 July

Type of School	2006
Contributing	798
Full Primary	1,128
Intermediate	123
Primary Subtotal	**2,049**
Composite	136
Restricted Composite	5
Correspondence	1
Composite Subtotal	**142**
Year 7-15	102
Year 9-15	233
Secondary Subtotal	**335**
Special	**47**
Total	**2,573**

Note: Includes 6 Health Camps and 3 Hospital Schools. Excludes Kura Teina and Teen Parent Units
Data source: July roll return, Ministry of Education

Number and Percentage of Teachers by Management Level, School Type and Gender, April 2006

		Number		Percentage	
		Women	Men	Women	Men
Primary	Base scale	16,222	2,527	75	55
	Middle management	4,092	876	19	19
	Senior management	362	116	2	3
	Principal	885	1,081	4	24
	All teachers	21,561	4,600	100	100
Secondary	Base scale	7,855	4,905	68	58
	Middle management	3,108	2,740	27	32
	Senior management	512	634	4	7
	Principal	90	221	1	3
	All teachers	11,565	8,500	100	100
Composite, incl area schools	Base scale	1,087	448	72	58
	Middle management	349	213	23	28
	Senior management	45	55	3	7
	Principal	34	56	2	7
	All teachers	1,515	772	100	100
Special, incl residential schools	Base scale	562	125	68	63
	Middle management	218	43	27	22
	Senior management	16	5	2	3
	Principal	25	24	3	12
	All teachers	821	197	100	100
All Schools	Base scale	25,848	8,038	73	57
	Middle management	7,808	3,896	22	28
	Senior management	943	812	3	6
	Principal	1,034	1,382	3	10
	All teachers	35,633	14,128	100	100

Data Source: Teacher Payroll Data Warehouse, Ministry of Education

Number and Percentage of Teachers by School Type and Gender, April 2006

School Type	Number			Percentage	
	Women	Men	Total	% Women	% Men
Primary	21,561	4,600	26,161	82	18
Secondary	11,565	8,500	20,065	58	42
Composite, including area schools	1,515	772	2,287	66	34
Special, including residential schools	821	197	1,018	81	19
All schools	**35,462**	**14,069**	**49,531**	**72%**	**28%**

Data source: Teacher Payroll Data Warehouse, Ministry of Education

6.4 Staff Experience Survey (first survey)

Have your say!

Your school is one of twenty schools participating in a Pay & Employment Equity Review in the compulsory schooling sector. The Review is investigating and assessing whether women and men:

1. Have an equitable share of **rewards** (including pay but not just pay)
2. **Participate** equitably in all areas of the school and
3. Are treated with **respect and fairness**

Schools involved:
The review is happening across primary, secondary, area, and special schools. It has been coordinated and endorsed by unions (NZEI, PPTA, PSA, SFWU), the NZSTA, and the Ministry of Education.

Staff involved?
All staff employed by the Board of Trustees is included in this review – support staff, teachers, (including fixed term and long term relievers; resource and itinerant teachers) and principals.

This questionnaire:
This survey is a means of finding out whether there are any gender differences in people's perceptions and experiences on a range of important issues.

What will happen to the results?
All data and findings from the sample schools will be analysed together to produce a report and response plan on Pay and Employment Equity across the sector.

The survey is anonymous - Individuals will not be identified.

The survey should take around 15 minutes complete.

Questions have been grouped into the following sections:
A   Individual information
B   Advancement and fair pay
C   Professional development
D   Work-life balance and job flexibility
E   Ability to have a say
F   Performance management
G   Fair treatment and support
H   Opportunities for men and women

Please take a few minutes to complete this questionnaire. If you are completing a hard copy, please mail to Gill Robinson, Project Coordinator, Ministry of Education, P O Box 1666, Wellington.

Thanks very much for your help.

Instructions

Some questions will allow only one answer, while others will allow more than one answer.

'Manager' in this survey refers to the person you report to – e.g. your supervisor, syndicate leader, head of department or faculty, or member of the senior management team, or principal. Your manager is likely to have responsibility for your performance management.

A   Please complete the following information about yourself:

a   School name: _____

b   Are you a teacher, support staff or residential school support staff employee?

Teacher or principal ☐   *Support staff* ☐   *Support staff (Residential school)* ☐

c   What is your job title? _____
(refer to list of positions. If you have more than one role, write all that apply).

d   What is your gender?

Female ☐   *Male* ☐

e   What is the gender of your immediate manager?

Female ☐   *Male* ☐

f   What is your age group?

15-24 ☐   *25-34* ☐   *35-44* ☐   *45-54* ☐   *55+* ☐

g   How many years have you been employed in this school?

Less than 2 ☐   *2-4* ☐   *5-9* ☐   *10-14* ☐   *20+* ☐

h   How many total years have you been employed in schools?

Less than 2 ☐   *2-4* ☐   *5-9* ☐   *10-14* ☐   *20+* ☐

i   On what basis are you employed?

Full-time ☐   *Part-time* ☐   *Casual/Daily Basis* ☐

j   Is your position permanent or not?

Permanent ☐   *Fixed-term or limited tenure* ☐

k   Did you work on a voluntary basis before you were appointed to a position in this school?

Yes ☐   *No* ☐

l   Did you receive a letter of appointment when appointed to your job.

Yes ☐   *No* ☐   *Don't Know* ☐

B   **These questions are about advancement and fair pay**

Please indicate your level of agreement or disagreement with the following statements by ticking the most appropriate box, or tick the boxes that apply to you.

1   At present I am interested in advancement within this school or another school.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

2   I am confident about my prospects for advancement within this school or another school.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

3   I am confident that my applications for different positions within the school will be (or have been) considered fairly.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

4   I have received encouragement (formal or informal) to apply for promotion from managers in this school.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

5   If I choose to, I am able to work part-time in this school and continue to advance my career.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

6   In my work area, it is possible to hold a management position and work part-time.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

7   This school actively supports opportunities for the advancement and growth of part-time employees.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

8   I believe I am paid fairly compared to others doing similar or the same work within this school.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

C   **These questions are about professional development**

9   I am provided with good opportunities for goal setting, training & professional development.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

10   I am confident that I have sufficient professional development opportunities offered to me so I can do my job.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

11   I am encouraged to participate in activities that will help my professional development needs.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

12 My manager and I have agreed to a plan for my professional development needs within the past 12 months.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

13 I have undertaken the following professional development in the last 12 months (tick all that apply).

Project work ☐   *Secondment* ☐   *Conferences/Seminars* ☐

Induction ☐   *Mentoring (formal or informal)* ☐   *Whole school professional development* ☐

Training courses ☐   *Mentoring (formal or informal)* ☐   *Study towards qualifications* ☐

None undertaken ☐

14 The ways my new skills gained through professional development have been recognised in the last 12 months are: (tick all that apply)

Change to my pay ☐   *Change to my grade* ☐   *Increased responsibilities* ☐

Change to my JD ☐   *Other* ☐   *None* ☐

Not Applicable ☐

15 During the last year the following barriers have prevented me from taking up professional development opportunities: (tick all that apply)

Cost to school ☐   *No barriers experienced* ☐   *Cost to me* ☐

No PD plan ☐   *School already used up PD funds* ☐   *Already used my allocated PD time/money* ☐

No opportunities offered ☐   *Family responsibilities* ☐   *No resulting acknowledgement or remuneration* ☐

Other ☐

D   These questions are about work-life balance and job flexibility

16 This school assists employees achieve a good work-life balance.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

17 My immediate manager is committed to assisting employees achieve a good work-life balance.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

18 I am able to balance my family responsibilities and my work demands.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

19 I am satisfied that the school caters for requests for flexible hours where possible.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

20   I have requested flexible working hours in the last 12 months with the following result.

Request Agreed ☐   *Request renegotiated and agreed* ☐   *Request denied with reasoning given* ☐

Request denied (no reason) ☐   *Not Applicable* ☐

21   If you have flexible hours, what type are they?

Job-share ☐   *Flexitime (glide-time)* ☐   *Working part-time* ☐

Other ☐   *Not Applicable* ☐

22   My ability to work certain shifts or specific hours is affected by my family responsibilities.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

23   Leave arrangements are sufficiently flexible to enable me to handle important family issues.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

24   Have you had to take time off work during the past 12 months to care for children or dependent family members?

Yes ☐   *No* ☐

25   If yes, how was that time off recorded? (tick all that apply)

Sick Leave ☐   *Leave Without Pay* ☐   *Domestic Leave* ☐

Annual Leave ☐   *Other* ☐   *Don't Know or Not Applicable* ☐

E   These questions are about your ability to 'have a say' in your workplace

26   I have opportunities to contribute my ideas to my work team or department in ways I feel comfortable with.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

27   I am confident that there are processes in place that allow me to put my view about professional issues to the Board of Trustees.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

28   I have opportunities to put my view about professional issues to senior managers in ways I feel comfortable with.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

29   I have opportunities to put my view about professional issues at staff meetings or whole school meetings in ways I feel comfortable with.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

30   I am confident that there is provision and support for me to attend and participate in school staff meetings (including those held outside my regular work hours).

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

31 For staff meetings I can't attend, I am confident that I receive feedback on the discussion and decisions (e.g., through minutes or verbal report)

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

F   These questions are about performance management

32 I am confident that my job performance is fairly assessed.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

33 I receive honest and frank feedback on my performance.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

34 I have an up to date job description that clearly describes my job.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

35 I have opportunities to negotiate changes to my job description.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

G   These questions are about fair treatment and support

36 I am confident that my manager treats me fairly and with respect.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

37 I have access to the equipment, facilities, and resources that enable me to do my job.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

38 I am confident that this school deals fairly and appropriately with discrimination, harassment (including sexual harassment and bullying) and other inappropriate behaviour towards staff by managers, colleagues, or students.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

H   These questions ask you to compare opportunities for men and women in this school:

39 I believe the following about the chances for promotion of women and men in this school:

Men have a better chance than women ☐   *Men and woman have an equal chance* ☐

Women have a better chance than men ☐   *Don't Know or Not Applicable* ☐

40 I believe the following about pay for men and women for performing similar work within this school:

Men are paid more than woman ☐   *Men and women are paid equally* ☐

Women are paid more than men ☐   *Don't Know or Not Applicable* ☐

41 I believe the following about units given to men and women for performing similar work in this school: *(units may be management units (MUs), middle management allowances (MMAs), or units for recruitment, responsibility, and retention)*

Men have more units than women for similar work ☐   *Men and women have similar number of units for similar work* ☐

Women have more units than men for similar work ☐   *Don't Know or Not Applicable* ☐

42 I believe the following about rewards (other than pay) given to men and women for performing similar work within this school:

a Smaller class sizes:

Men are rewarded more than women ☐   *Men and woman are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

b Desirable class groupings:

Men are rewarded more than women ☐   *Men and woman are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

c Professional association membership fees:

Men are rewarded more than women ☐   *Men and woman are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

d Study fees:

Men are rewarded more than women ☐   *Men and woman are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

e Time off for study:

Men are rewarded more than women ☐   *Men and woman are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

43 I believe the following about professional development for women and men in this school:

Men have greater opportunity and access to PD than women ☐   *Men and woman have equal opportunity and access to PD* ☐

Women have greater opportunity and access to PD than men ☐   *Don't Know or Not Applicable* ☐

Questions 44 to 46 are for full-time employees only - if you work part-time, please go straight to Q 47:

44 Would you like to change from working full–time to working part-time? If no, go to the end of the survey, Otherwise, please continue.

Yes ☐   *No* ☐   *N/A (already work part-time or casual)* ☐

45   If yes, what would assist you to work part-time?

Sick Leave ☐   *Leave Without Pay* ☐   *Domestic Leave* ☐

Annual Leave ☐   *Other* ☐   *Don't Know or Not Applicable* ☐

46   If yes, are you experiencing any of the following barriers that prevent you from working part-time?

Can't afford it ☐   *Employer won't agree* ☐   *No provision for part-time work* ☐

Not financially worth it ☐   *Would not reduce workload* ☐   *Not feasible for my job* ☐

Other (specify) [   ]

Questions 47 to 50 are for part-time or casual staff only

47   As a part-time or casual employee, do you believe that you are disadvantaged compared to full-time workers in having opportunities for the following: (tick all that apply)

Allocation of units ☐   *Advancement / promotion* ☐   *Professional Development* ☐

Attend staff meetings or be on committees ☐   *Less Stressful Workplace* ☐   *Don't Know or Not Applicable* ☐

Other (specify) [   ]

48   Would you like to work more hours on a regular basis?

Yes ☐   *No* ☐

49   If Yes, what would assist you in being able to work more hours? (tick all that apply)

Suitable childcare in my workplace ☐   *Suitable childcare in my home or community* ☐   *More suitable hours or rostering arrangements* ☐

Less stressful workplace ☐   *Don't Know or Not Applicable* ☐

Other (specify) [   ]

50   Were any of the following a significant reason for applying for this position? (tick all that apply)

Part-time hours ☐   *School holidays off* ☐   *Flexible Hours* ☐   *None of These* ☐

6.5 Supplementary Online Perception Survey (second survey)

This perception survey is part of the Pay & Employment Equity Review which is investigating whether women and men:

1.   Have an equitable share of rewards (including pay but not just pay)
2.   Participate equitably in all areas of the school and
3.   Are treated with respect and fairness

The review is happening across primary, secondary, area, and special schools. It has been coordinated and endorsed by unions (NZEI, PPTA, PSA, SFWU), the NZSTA, and the Ministry of Education.

Staff involved?
This survey is for all staff employed by the Board of Trustees – support staff, teachers (including fixed term and long term relievers; resource and itinerant teachers); and principals.

This survey
This survey is a means of finding out whether there are any gender differences in people's perceptions and experiences on a range of important issues.

It has been prepared to 'fill gaps' in information which was collected last year through a sample of schools, surveys and focus groups. The intention is to canvass staff experience across a wider range of schools with respect to size, decile, type and location.

What will happen to the results?
All data and findings from the review processes will be analysed to produce a report and response plan on Pay and Employment Gender Equity across the sector.

The survey is anonymous - Individuals and schools will not be identified.

The survey should take around 7-8 minutes to complete.
Questions have been grouped into the following sections:
A.   Individual information
B.   Rewards (other than pay)
C.   Professional development
D.   Work-life balance/ work flexibility
E.   Bullying and harassment
F.   Having a voice

Thank you for taking the time to fill in this survey.

Instructions

Please indicate your level of agreement or disagreement with the following statements by ticking the most appropriate box, or tick the boxes that apply to you.

A   Please complete the following information about yourself:

1   School name: _____

Primary ☐   *Secondary* ☐   *Area/Composite* ☐   *Special School* ☐

2   Are you a teacher, support staff or residential school support staff employee?
Teacher or Principal ☐   *Support staff* ☐   *Support staff (Residential School)* ☐

3   What is your job title? _____
(refer to list of positions. If you have more than one role, write all that apply).

4   What is your gender?
Female ☐   *Male* ☐

5   What age group do you fit into?
15-24 ☐   *25-34* ☐   *35-44* ☐   *45-54* ☐   *55+* ☐

6   How many years have you been employed in this school?
Less than 2 ☐   *2-4* ☐   *5-9* ☐   *10-14* ☐   *20+* ☐

7   How many total years have you been employed in schools?
Less than 2 ☐   *2-4* ☐   *5-9* ☐   *10-14* ☐   *20+* ☐

8   On what basis are you employed?
Full-time ☐   *Part-time* ☐   *Casual/Daily Basis* ☐

9   Is your position permanent or not?
Permanent ☐   *Fixed-term or limited tenure* ☐

B   These questions are about advancement and fair pay

Please indicate your level of agreement or disagreement with the following statements by ticking the most appropriate box, or tick the boxes that apply to you.

10   I believe the following about rewards (other than pay) given to men and women for performing similar work within this school:

a: Smaller class sizes:

Men are rewarded more than women ☐   *Men and women are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

b: Desirable class groupings:

Men are rewarded more than women ☐   *Men and women are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

c.   Professional association membership fees:

Men are rewarded more than women ☐   *Men and women are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

    d.   Study fees:

Men are rewarded more than women ☐   *Men and women are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

    e.   Time off for study:

Men are rewarded more than women ☐   *Men and women are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

    f.   Other 'rewards': e.g., location or size of classrooms, phone in room, conferences. Please specify: _____

Men are rewarded more than women ☐   *Men and women are rewarded equally* ☐

Women are rewarded more than men ☐   *Don't Know or Not Applicable* ☐

11   I believe the following about allocation of non-contact or class release time for men and women in this school:

Allocations are equitable for men & women ☐   *Allocations favour men* ☐

Allocations favour women ☐   *Don't Know or Not Applicable* ☐

12   Do you believe either part-time (including casual) employees or full-time employees are disadvantaged in respect to the following: (tick the box that applies for each question):

	Part-time staff are disadvantaged	*Part-time and full-time staff are treated equitably*	*Full-time staff are disadvantaged*
Allocation of units or responsibilities	☐	☐	☐
Advancement / Promotion	☐	☐	☐
Access to non-contact or classroom release time	☐	☐	☐
Access to professional development	☐	☐	☐
Invitations to attend staff meetings or to be on committees	☐	☐	☐
Ability to attend staff meetings or to be on committees	☐	☐	☐

C   These questions are about access to professional development

13   I am provided with good opportunities for goal setting, training & professional development needs:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know/N/A* ☐

14   My manager and I have agreed to a plan for my professional development needs within the past 12 months:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know/N/A* ☐

15   I believe the following about opportunity and access to professional development for women and men in this school:

Project work ☐   *Secondment* ☐   *Conferences/Seminars* ☐

Induction ☐   *Mentoring (formal or informal)* ☐   *Whole school professional development* ☐

Training courses ☐   *Mentoring (formal or informal)* ☐   *Study towards qualifications* ☐

None undertaken ☐

16   The ways my new skills gained through professional development have been recognised in the last 12 months are: (tick all that apply):

Change to my pay ☐   *Change to my grade* ☐   *Increased responsibilities* ☐

Change to my JD ☐   *Other* ☐   *None* ☐

Not Applicable ☐

17   During the last year the following barriers have prevented me from taking up professional development opportunities: (tick all that apply):

Men have greater opportunity and access to PD than women ☐   *Men and woman have equal opportunity and access to PD* ☐

Women have greater opportunity and access to PD than men ☐   *Don't Know or Not Applicable* ☐

D   These questions are about work-life balance and job flexibility

18   This school assists employees achieve a good work-life balance:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

19   I believe this school fairly considers requests for staff to alter their hours of work due to change in personal or family circumstances:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

20   Leave arrangements are sufficiently flexible to enable me to handle important family issues:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

E   These questions are about bullying or harassment of staff in your school

21   My school has a clearly articulated policy about what constitutes harassment, inappropriate behaviour, bullying and discrimination and how they are to be addressed:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

22   All school staff have the opportunity to be involved in developing this policy.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

23   This policy is actively promoted throughout the school to ensure staff are aware of it.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

24   I am confident that this school deals fairly and appropriately with discrimination, harassment (including sexual harassment and bullying) and other inappropriate behaviour towards staff by management, colleagues, or students.

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

F   **These questions are about your ability to 'have a voice' in your school**

25   I have opportunities to contribute my ideas to my work team or department in ways I feel comfortable with:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know/N/A* ☐

26   I am confident that there are processes in place that allow views about professional issues to be put to the Board of Trustees:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

27   I have opportunities to put my view about professional issues to senior managers in ways I feel comfortable with:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

28   I have opportunities to put my view about professional issues at staff meetings or whole school meetings in ways I feel comfortable with:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

29   I am confident that there is provision and support for me to attend and participate in school staff meetings (including those held outside my regular work hours):

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

30   I am confident that my views are considered fairly by school managers and colleagues:

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

31   For staff meetings I can't attend, I am confident that I receive feedback on the discussion and decisions (e.g., through minutes or verbal report):

Strongly agree ☐   *Agree* ☐   *Disagree* ☐   *Strongly disagree* ☐   *Don't know* ☐

Thank you for completing this survey.

6.6   Principals' Focus Group Questions and Survey

Please complete the following short survey:

	Options:
Gender	M/F
Current school decile	1-10
Age group	A = <25
	B = 25-34
	C = 35-44
	D = 45-54
	E = 55+
U grade of school	1-12 (or give roll or size of school)
Type of school	P = primary
	S = secondary
	A = area
Teaching principal	Y/N

1. How many principal positions did you apply for before achieving your first principalship?

    No: _____

2. What was the size and decile of the school where you held your first principal position?

    Size: _____   Decile: _____

3. How many principal positions have you held?   _____

4. Briefly outline your career pathway in teaching (including years of experience in each role) before your first principal position?

    _____
    _____
    _____
    _____
    _____

5. Indicate the main factors that influenced your decision to seek a career pathway to principalship
    Tick the main factors that apply:

    _____   mentoring by another principal or senior manager
    _____   opportunities to 'act up
    _____   opportunities to job share
    _____   new initiatives from Ministry of Education
    _____   participation in Aspiring Principals Programme
    _____   availability of principalship position
    _____   salary / remuneration offered
    _____   sought opportunity or challenge of leadership
    _____   locality of school you applied to
    _____   other (please state)

    _____

    _____

6. Are you considering applying for other principal positions?   Y/ N

7. If you answered **No to Q6,** what are the influences on your decision not to apply for further principal positions?

    _____   encouragement by boards or peers
    _____   higher salary
    _____   challenge of a new school
    _____   challenge of a bigger school
    _____   want to move to a smaller school
    _____   location of school
    _____   increase in status
    _____   other (please state)

    _____

    _____

Focus Group Questions for Principals

1. Think about what influenced your decision to apply for your first principal position. What were the important influences?

    Cues: formal and informal influences / mentoring / aspiring principals programme / acting up in higher role / work-life balance considerations etc.

2. Think about your professional development/learning needs as a principal. How do you negotiate or plan your PD/L?

3. Think about how your employer supports you in your role in the school? How does this happen/not happen?

4. Think about your next step. What supports are in place to prepare or assist you in your next step – to another principalship / other careers?

6.7   References

1.   Brooking, K.J. (2003), *Board of trustees selection practices of principals in New Zealand primary schools: Will the future be female?* Paper presented at BERA Conference, Edinburgh 11-13 September 2003).

2.   Brooking, K.J. (2005), *New Zealand boards of trustees' selection of primary school principals*. Unpublished PhD thesis. Deakin University; Melbourne.

3.   Brooking, K.J. (2006), *Selecting a principal on merit or gender?* New Zealand Principal, 21 (1) March.

4.   Brooking, K.J. (2008), *The future challenge of principal succession in New Zealand Schools: Implications of quality and gender*. Journal of the Commonwealth Council for Educational Administration & Management. 36(1), 41-55.

5.   Smith, J. (1999), *We need more males in primary teacher education! Or do we?* Paper presented at the Australian Association for Research in Education Conference, Melbourne.

6.   Wylie, C. (2008), *NZCER presentation to NZFP Principal Wellbeing / Hauora Hui*, 16 June 2008.

7.   NZEI Te Riu Roa, NZSTA and Ministry of Education. (2003), *Report to the Minister of Education of the 2003 Working Party on Primary Principals' Appointments*. Wellington.

8.   Hodgen, Edith, & Wylie Cathy. (September, 2005), *Stress & wellbeing among New Zealand principals*. A report prepared for the New Zealand Principals' Federation. NZCER: Wellington.