

February 2017

Branch chairs' handbook

A rough guide to organising a PPTA branch



Contents

PPTA represents the professional and industrial interests of secondary and area school teachers and principals.

PPTA | PO Box 2119, Wellington 6140 | p. +64 4 384 9964 | e. enquiries@ppta.org.nz

File: MIS3/11



| | |
|---|----|
| Welcome | 2 |
| About PPTA | 3 |
| PPTA member benefits | 3 |
| Joining PPTA | 4 |
| The branch..... | 5 |
| Important dates for PPTA branches | 7 |
| Recruitment..... | 8 |
| How to access branch membership lists | 9 |
| Meetings | 10 |
| Consultation | 13 |
| Health and safety | 14 |
| Getting into action | 16 |
| Branch campaigns | 17 |
| Branch issues | 18 |
| Role of the field officer..... | 19 |
| Contacting field offices | 20 |
| Useful acronyms and links | 21 |
| Helpful checklist for branches..... | 23 |

Welcome: Nau mai haere mai

Thank you for taking on the position of branch chair at your school. PPTA Te Wehengarua is here to support you in this key role regionally and nationally.

This handbook provides you with information that you will find helpful and constructive in carrying out your duties as branch chair.

The information contained in this publication is a quick reference only.

More detailed information about issues contained in this handbook is available at ppta.org.nz or you can contact your local PPTA office (see directory on page 20 of this publication).

It is with great pleasure that we introduce you to the Branch Chairs' Handbook.



Michael Stevenson
General Secretary



Jack Boyle
President

About PPTA

How PPTA works

Your association represents approximately 17,500 members in over 570 branches based in state secondary schools, area schools, intermediate schools and technology centres. Branches are grouped into 24 geographic regions. The regions are represented on PPTA's national executive and at the association's annual conference.

The executive and its Māori partner Te Huarahi Maori Motuhake (Te Huarahi) comprise elected representatives who work for members nationally.

There are also networks for women, establishing teachers, LGBTIQ+ members, principals, deputy and associate principals and Pasifika members.

PPTA member benefits

- National collective agreements that guarantee pay and conditions
- Professional and employment advice and advocacy
- Representation to help resolve employment problems
- Employment relations courses
- Professional networks and a national voice on professional issues
- Accommodation, rental car, banking, health and travel insurance discounts

For more information about PPTA member benefits visit ppta.org.nz/membership

Joining PPTA

Membership forms can be obtained through your local PPTA field office or you can download one at ppta.org.nz/membership.

The subscription rate for membership is 1 percent of your fortnightly base salary. (Base salary includes the sum of all full-time or part-time earnings but excludes units and allowances).

It is important to advise PPTA national office of changes in membership promptly; especially those joining, resigning or taking leave without pay.

Email: membership@ppta.org.nz Phone: 0800 630 400

The branch

The role of the branch

The PPTA branch is the most immediate and significant level of involvement for most members. Branches and branch officers have a responsibility to:

- Monitor conditions within the school, including compliance with the relevant collective agreement
- Ensure that members who have problems receive assistance where appropriate
- Recruit non-members
- Implement association policy within the school
- Remain in contact with their PPTA regional organisation
- Express branch views on policy matters to the region and the PPTA executive
- Ensure members receive information from the association and on issues relating to their employment
- Elect branch officers including a branch chair. It is important that branch officers have the support of the branch

What does a branch chair do?

- Chair branch meetings
- Take a leadership role to help resolve or raise workplace issues on behalf of the branch
- Lead branch delegations to the principal and board of trustees
- Communicate as required with the regional chair, the executive member and the local PPTA field office. Contact details are available from national office or your local field office
- Contact and involve the wider PPTA (field officer, regional chair, executive member, national office) when emergency situations warrant their involvement
- Help members resolve employment problems, including contacting the field officer if advice and/or representation is needed
- Monitor membership levels and recruit non-members
- Become familiar with the terms and conditions of the collective agreement, and always seek advice from the field officer if unsure
- Have a reasonable understanding of the PPTA constitution, in particular rules 5-20 relating to membership and branches, and the code of ethics. Visit: ppta.org.nz/about-ppta/ppta-constitution
- Become aware of key PPTA dates (see pg 7)

- Ensure branch representation at regional meetings and all branch members attend paid union meetings (PUMs)
- Liaise with the field officer regarding branch visits

Branch effectiveness

The following checklist is a useful tool in enabling you to carry out a SWOT analysis (strengths, weaknesses, opportunities and threats) of your branch:

- Do you have people who are prepared to take leadership roles in the branch?
- Is your branch's member density high? (over 80-90%)
- Are new members of staff made to feel welcome and asked to join?
- Is PPTA information displayed, publicised and discussed by members?
- Does the branch respond in a timely manner to requests for information from the union, such as surveys and elections?
- Is the branch represented at regional meetings?
- Does the branch send members to Mahi tika and other training?
- Do branch officers feel confident finding relevant information when members need advice?
- Does the branch hold meetings regularly? And are they well attended?
- At those meetings, are meeting procedures followed and minutes kept?
- Does the branch monitor conditions of employment and respond to issues?
- Do the branch officers have constructive relationships with the principal and board?

Important dates for PPTA branches

| | |
|-----------------------|--|
| 31 January | Financial year ends for branches and regions. |
| 1 February | Association year begins. Branch officers should be in place. |
| February | Completed branch directory forms should be sent to the PPTA field office. |
| February | Mahi tika dates circulated to branches. |
| Feb/March | Branch officers' training held. |
| 15 March | Last date for sending names of branch chair to field office. Branch financial statements should be completed and sent to the regional treasurer. |
| 31 March | Financial year ends for PPTA national office. |
| Last Monday of term 3 | Closing date for executive nominations. |
| Week 1 & 2 of term 4 | Voting closes for executive election. |
| Early December | Election of regional officers for the following year. Election of branch officers for following year. Early December |

Recruitment

Membership recruitment is one of the branch officer's most important responsibilities.

Here is a 10-step plan to assist with recruitment at the beginning of the year.

1. Get a staff list for the current year
2. Get a current PPTA branch member list. Lists will be sent to the branch in February or can be downloaded from the PPTA website (see following page)
3. Tick off the branch members on the staff list
4. Divide the names of teaching staff members who do not appear on the PPTA branch list among members of the branch committee
5. Members of the branch committee should then approach new staff members and check their membership status. Ensure any non-members are given a membership form, a copy of the Join PPTA brochure and information about membership benefits
6. Follow-up with people who have been given membership forms
7. Post the forms to PPTA national office promptly and keep a record of having sent them. A teacher is deemed to be a member at the time their signed membership form is received by a PPTA official (this includes the branch officers)
8. When having discussions with new staff members check that :
 - They were offered the relevant collective agreement
 - They have an appropriate letter of appointment.
 - They were given information about applicable allowances.
 - First year teachers have completed a salary assessment form and have their correct non-contact entitlements
9. If the letter of appointment states that the member is fixed term visit ppta.org.nz/advice-and-issues/appointments to check whether the reason given is valid. If in doubt get in touch with your field officer
10. Keep new (and existing) members informed about:
 - branch and regional meetings
 - Mahi tika courses
 - Branch officer training
 - Health and safety courses
11. Congratulate yourself and your team on the efficient management of the branch.

Note: Repeat steps 5 to 10 above as and when required

How to access branch membership lists

Branch officers can access a membership list for their branch from the website.

- Go to ppta.org.nz
- To log in:
 - Your username is your email address or your MoE number (no zeros in front)
 - Your password is your MoE number (no zeros in front).
- Change your password when you log in
- Click on “View branch lists”

Meetings

Branch meetings

Branch meetings should be held at least once a term to discuss PPTA business and allow members to raise and discuss issues. Additional meetings may be held to deal with urgent matters as they arise.

When raising issues with the principal or the board, it is important that the branch has given its authority to have those matters raised. Such authority comes from motions being passed in the branch meeting.

Meetings with the employer

Meetings with the principal are an important part of this role. Motions passed from the branch meeting will often need to be relayed to the principal. Members may also request that the branch chair raise individual matters on their behalf, or accompany them to meetings.

The branch chair and the principal should have open and honest communication and not mislead the other. (Good faith is fundamental to the employment relationship). This does not mean that agreement will always be reached.

Occasionally the branch chair will need to meet with the board of trustees. The requirements for good faith also apply to any communication to and from the board. It is advisable to make yourself known to the board chair.

When meeting with the employer it is good practice to:

- Be well prepared, including doing any research
- Decide on the make-up of the delegation
- Confirm the meeting time and agenda in advance of meeting, including notification of who will be attending
- Keep minutes of matters discussed
- Record any agreement reached
- Follow up with a letter to the principal confirming what was discussed and agreed to at the meeting
- Report back to the branch

Tips on engaging with principals and the community

- Keep it professional – maintain a high standard
- Our principals are members too – albeit under a different collective agreement
- Be open to dialogue; quote facts – no need to apologise for a reasoned, evidence based stance
- Know when to seek help or advice – from a field officer, regional chair/executive member, etc
- Any contact with the media, for PPTA, should be through the regional chair (for local issues) or through the PPTA president

Good faith

Employers and employees are obliged to deal with each other fairly, reasonably and in good faith at all times. In broad terms, this means that both employers and employees must:

- act honestly and openly
- raise issues in a fair and timely way
- be constructive and cooperative
- be proactive in providing each other with relevant information and consider all information provided
- respond promptly and thoroughly to reasonable requests and concerns
- keep an open mind, listen to each other
- treat each other respectfully

Good faith generally involves using practical common sense. Acting in good faith reduces the risk of conflict and problems. It is also a minimum requirement of the Employment Relations Act 2000.

Other meetings

- Regional meetings
The branch needs to be represented at regional meetings.
- Paid union meetings (PUMS)
The branch chair has a responsibility to ensure members attend these and that a roll is taken.

- Individual meetings

The branch chair will, from time to time need to meet individually with members of the branch and with the field officer. When dealing with individual cases be mindful of issues of confidentiality.

Consultation

The collective agreements require that schools must consult with employees before making a number of staffing decisions. These include:

- Distribution of units
- Distribution of Middle Management Allowances (MMAs) and Senior Management Allowances (SMAs)
- Timetable policy (this includes non-contacts, class size and hours of work)

Surplus staffing

Reference to this can be found in your collective agreement which is also available at ppta.org.nz/collective-agreements.

As good employers, schools should consult with staff on policies and issues that affect their day to day employment. Consultation means the employer seeks input from staff and genuinely considers those submissions prior to making a final decision.

The PPTA branch can and should be involved in consultation processes to represent the interests of its members.

The following link has a summary of the legal meaning of consultation ppta.org.nz/dmsdocument/53.

Health and safety

Health and Safety at Work Act 2015

The Health and Safety at Work Act 2015 came into effect on 4 April 2016. It makes the health and safety of workers in the workplace a priority.

Health and Safety Representatives (HSRs)

HSRs are workers who are elected to represent their colleagues on health and safety matters and receive appropriate training.

Staff HSRs must be elected by the staff, not appointed by management.

Any member can request the election of a HSR.

A HSR represents a specific work group in the workplace. The Board determines whether the school needs one or more work groups. Unless a Board determines otherwise, a work group will comprise all the workers in the school.

A HSR may perform a number of functions including:

- representing workers generally on health and safety matters and investigating complaints from workers about health and safety issues
- representing a worker on a specific health and safety matter (including a complaint) if asked to do so by the worker
- monitoring health and safety measures taken by the board and providing feedback to the board about health and safety compliance
- inquiring into anything that appears to be a health and safety risk to workers and making recommendations to the board on work health and safety
- promoting the interests of workers who have been harmed at work, including in relation to arrangements for rehabilitation and return to work

HSRs, once trained, also have the power under the act to issue provisional improvement notices (PINs) and direct members of the work group to cease work.

Once elected, the field office should be given the names of HSRs so that they can be entered into the database at www.worksafereps.org.nz and invited to a training course.

In addition the employer may appoint a Health and Safety Officer and organise a Health and Safety Committee of which the HSR should be a member.

Role of the branch

The role of the branch chair is to ensure that the employer is complying with the requirements for a worker participation system and that elections and training for staff reps occurs.

Be informed

Visit WorkSafe's website: www.worksafe.govt.nz.

The Ministry of Education also has guidance and toolkits available at: www.education.govt.nz/ministry-of-education/specific-initiatives/health-and-safety/h-and-s-for-boards-of-trustees-and-school-leaders.

Questions?

Any queries regarding Health and Safety can be sent to: hands@ppta.org.nz.

Getting into action

If there is an issue at your school that will require branch action, a good place to start is to apply the “anger, hope, action” methodology. This is designed to move members past apathy and to empower them to take action to improve their situation.

Anger

This emotion highlights the issues that are widely held and deeply felt. In discussion with members you could ask what concerns them about work, what is the effect of the issue and what they are prepared to do to sort out the problem.

Hope

Once the issues are identified, ascertain whether the identified issues are winnable in part or in whole. This will influence how the branch reacts to the concerns.

You can share some success stories with them, where members at your school or elsewhere have improved conditions by acting collectively. Remind the branch that if enough people take action, change can occur.

Action

Plan as a branch some action to take collectively, whether that involves writing letters, calling meetings or taking other steps. No matter how small the action, the collective approach will improve branch confidence and effectiveness. A series of actions related to an issue is what constitutes a campaign.

Branch campaigns can be very useful and are an effective tool to engage members, resolve issues and effect change.

Many decisions made by the Executive require branch action and support in order to succeed. An example of this is the action around national collective agreement negotiations, where the Branch Officers have an important role.

Branch campaigns

The following is a checklist to help plan a campaign at branch level.

1. Define the issue

- Is the issue widely held and deeply felt?
- Is it winnable in part or in whole?
- Is everyone aware of the issue?

2. Research the issue

- What does the collective agreement, relevant law or school policies say about this issue?
- What further information or support is needed?

3. Determining the action

- What action is the branch comfortable taking?
- Who is willing to do what? By when?

4. Review and follow-up

If that action does not work, what are the next tasks or alternative action which can be taken to address this matter?

5. Celebrate your success as a branch!

Branch issues

- Does the school have an effective Health and Safety Committee with worker participation and trained Health and Safety Reps?
- Does your school have a timetable policy that complies with the CA?
- Are year 1 and 2 Provisionally Certified Teachers receiving their correct non-contact entitlements?
- Do all other members have their correct entitlement of non-contact time?
- Are MMAs allocated according to the provisions of the CA?
- Are units allocated according to the provision of the CA?
- Do appointment letters for non-permanent staff meet the requirements of the CA and the Employment Relations Act?
- Are members reimbursed as per the CA when attending school camps and call back days?
- Is the service increment widely publicised amongst the membership?
- Are staff consulted about issues affecting them?
- What other issues affect the branch?

Role of the Field Officer

The role of the Field Officer is to support members who require representation, as well as provide advice on employment rights and guidance for interpreting the collective agreements.

The expectation is that branches should initially attempt to resolve disputes in the workplace. It is advisable to call the Field Officer for complex issues including discipline, surplus staffing, competence, and disputes over the interpretation of the collective agreement and unresolved health and safety problems.

The Field Officer may also attend branch meetings if invited, provide advice around school policies and may also run seminars/workshops for branches about specific issues (eg surplus staffing or bullying).

Contacting field offices

For advice consult your local PPTA field office.

Auckland

4 Western Springs Road, Morningside, P O Box 52 006, Auckland 1352
ph (09) 815 8610 fax (09) 815 8612
email auckland@ppta.org.nz

Hamilton

Level 1, 650 Te Rapa Road, Te Rapa, P O Box 20 294, Hamilton 3241
ph (07) 849 0168 fax (07) 849 1794
email hamilton@ppta.org.nz

Palmerston North

Level 2, cnr The Square and 359 Main Street, P O Box 168, Palmerston North 4440
ph (06) 358 4036 fax (06) 358 4055
email palmerston@ppta.org.nz

Christchurch

Level 1, 501 Papanui Road, Papanui, Christchurch
ph (03) 366 6524 fax (03) 379 4011
email christchurch@ppta.org.nz

Dunedin

Level 1, Queens Garden Court, 3 Crawford Street, P O Box 1561, Dunedin 9054
ph (03) 477 1311 fax (03) 477 1804
email dunedin@ppta.org.nz

Useful acronyms and links

Acronyms:

| | |
|--------------|--|
| ASTCA | Area Schools Teachers' Collective Agreement |
| AO | Advisory Officer (PPTA) |
| BOT | Board of Trustees |
| CA | Collective Agreements |
| CAPNA | Curriculum and Pastoral Needs Analysis |
| FO | Field Officer |
| GMFS | Guaranteed Minimum Formula Staffing |
| HSWA | Health and Safety at Work Act |
| MBIE | Ministry of Business Innovation and Employment |
| NET | New and Establishing Teachers Network |
| NZEC | New Zealand Education Council |
| PPTA | Post Primary Teachers' Association |
| PUM | Paid Union Meeting |
| STA | School Trustees Association |
| STCA | Secondary Teachers' Collective Agreement |

Links:

PPTA ppta.org.nz

Employment NZ www.employment.govt.nz

Healthcare Plus healthcareplus.org.nz

Education Gazette www.edgazette.govt.nz

Ministry of Education (MOE) www.education.govt.nz

NZ Council of Trade Unions (CTU) www.union.org.nz

Education Council www.educationcouncil.org.nz

Worksafe NZ www.worksafe.govt.nz

Useful tool kits:

Change management tool kit

<http://www.ppta.org.nz/resources/publication-list/2460-change-management>

Time table tool kit

<http://www.ppta.org.nz/resources/publication-list/2162-about-time>

Professional learning and Development tool kit

<http://www.ppta.org.nz/resources/publication-list/1651-pld-toolkit>

Helpful checklist for branches

Members

- Do you have a current branch list?
- Do you know how many members the branch has?
- Do you know what percentage of teaching staff are current members?
- Do you know how many members are fixed term?
- Are new staff members approached and encouraged to join?
- Have non-members been approached to join?

Positions

Are the following branch positions filled?

- Chair
- Secretary/Treasurer
- NETs contact
- Women's contact
- Other positions
- Does the branch have an active branch committee?
- Does the branch claim its annual capitation?
- Does the branch have a bank account

Meetings

- Does the branch meet at least once a term?
- Are branch meetings part of the school meeting cycle?
- Is an agenda circulated prior to meetings?
- Does the Branch Chair/Committee meet on a regular basis with the Principal?
- Do Committee Members attend Board meetings?

Mahi Tika training

- Do you have an up to date calendar for this year's courses?
- How many members have completed:
 - PCT
 - Stage One
 - Stage Two
 - Stage Three

Health and Safety

- Is there a functioning Health and Safety Committee?
- Do you have trained Health and Safety Representatives?

Communications

- Is there a PPTA Notice Board?
- Is there a slot at staff briefing for PPTA updates/information?
- Does the field office and Region have up to date contact records for branch officers?
- How does the Branch Committee communicate with members?