

# Appendices

## Terms of Reference

### The Purpose of the Taskforce

The PPTA and the Secretary for Education agreed, in the Terms of Settlement of the Secondary Teachers' Collective Agreement 2002-2004 (STCA), to a Ministerial Taskforce to examine and report on a number of issues related to secondary teachers' remuneration which had been raised but not fully explored or addressed during the negotiations and settlement of the STCA.

Specifically; "The Minister of Education shall convene a taskforce to examine and report on secondary teachers' remuneration. This Taskforce will examine and report on how the government can address wagepaths, and the impact on remuneration of workload, supply, demand, curriculum delivery, qualifications and other directly related issues that arise."

It is intended that information from the process and report will inform preparation of, but not pre-empt, the next bargaining round which will commence prior to the expiry of the STCA on 30 June 2004, in addition to supporting policy work. The focus should be on principles and design of the remuneration system, rather than quantum of funding. While the taskforce will not be concerned with the overall quantum of funding it should consider the best way for the Government to direct its funds in order to achieve its objectives.

The final report will be completed by 31 October 2003.

### Objective

The objective is to have a supply of high quality, appropriately qualified secondary teachers in state and integrated schools who will improve the learning outcomes of all students.

The Taskforce will develop a strategic, longer term, perspective on the issues facing the teacher sector over the next decade. The Taskforce will explore the issue of teachers investing in, and building their capability as highly effective teachers and how this should be recognised through qualifications and career paths. The Taskforce will consider the effectiveness of the existing system for remunerating secondary teachers to enable boards of trustees to recruit and retain highly effective teachers.

### Key Deliverables

#### **The Taskforce will provide:**

- a project plan setting out key steps, milestones and expected completion dates
- regular progress reports, and

- a completed report to the Minister of Education by 31 October that identifies a staged approach to addressing any of the issues identified over the short, medium and longer term.

### **Membership**

**The Taskforce will comprise the following members:**

- Chairperson
- two representatives from the PPTA
- one secondary school principal
- one representative of School Trustees,
- two representatives from the Ministry of Education, and
- secretariat support.

In addition, the Taskforce will call on a technical advisor to provide information and advice, and to scope any research or analytical work the Working Party deems useful to their deliberations.

### **Scope of the work**

**The Taskforce work and report will:**

- develop an understanding of the desired characteristics of the secondary teaching workforce and teachers development and career paths, taking account of developments in learning and the curriculum, the needs of students and schools, and wider developments in the labour market.
- identify the key principles, objectives and criteria of an effective remuneration system which will ensure an adequate supply of high quality secondary teachers, including middle management;
- research the characteristics and trends in remuneration systems used for other groups of professionals and knowledge workers including the contextual factors influencing these systems;
- provide an analysis of the current system for remunerating secondary teachers against the key principles, objectives and criteria;
- identify any significant aspects of the current system that could be improved, and the effects these weaknesses or limitations have on the recruitment, retention and motivation of secondary teachers;
- examine the nature of the issues affecting the recruitment and retention of teachers into middle management positions and possible measures to address these issues;
- explore the issue of supporting the ongoing professional development of the teacher;

- explore and advise on the development of, and access to, career pathways;
- consider non-salary remuneration mechanisms which might be applied to the secondary sector;
- identify any fiscal, industrial, school management or other implications that may arise from these recommendations, including the impact on other public sector labour markets.

**The report will also comment on:**

- how the remuneration system for secondary teachers could be more responsive to labour market conditions;
- how to ensure the remuneration system recognises and retains highly effective secondary teachers;
- how to ensure the salary and non-salary remuneration system encourages teachers to focus on on-going improvements in their teaching skills and achievements.

**The Alternative Dispute resolution Panel set up to provide recommendations for settlement of the STCA recommended further issues to be explored or reviewed by the taskforce including:**

- review the experience of pay bargaining in the secondary sector over the past decade for the purpose of assessing whether changes should be made to the pay fixing process to facilitate a speedy and non-disruptive resolution of disputes
- review the basis for fixing the salary of teachers in specialist subjects or curriculum areas who have current G3 equivalence but do not possess level 7 qualifications, and for whom a level 7 qualification may not be either relevant or available to them
- review the basis for fixing the remuneration of He Tohu Matauranga Māori teachers
- explore the desirability of including exit provisions for secondary teachers in the collective agreement to provide options for teachers who have become burnt out and who wish to leave the service
- review the workload of Heads of Departments (HODs) for the purpose of developing strategies directed at ensuring that schools have adequate numbers of highly qualified HODs in the foreseeable future
- review the possibility of creating incentives to encourage accelerated re-payment of student loans and retirement savings.

**Process**

- Engage with teachers directly to obtain their views and consider the evidence and information that teachers can offer

- Consult with relevant parties including principals and boards
- Collate and analyse existing data and research
- Seek out (without travel) any overseas information on developments and trends in secondary teacher remuneration, career paths, recruitment and retention and other related issues
- Recommend research to address gaps in information.

## Appendix B

### Membership of the Ministerial Taskforce on Secondary Teacher Remuneration

#### Chair

Dame Margaret Bazley DNZM

#### Minister's Appointees

Margaret Bendall Principal, Epsom Girls Grammar School

Graeme Marshall Ministry of Education, Central South Regional Manager

Chris Collins Ministry of Education, Senior Manager, Industrial Relations Unit.

#### PPTA Representatives

Jen McCutcheon PPTA Senior Vice President

Debbie Te Whaiti PPTA Junior Vice President

#### NZSTA Representative

Ray Newport General Manager, NZSTA

#### Secretariat

Kimberley Gilmour Ministry of Education

#### PPTA Support

Rob Willetts (observer) Advisory Officer

## Appendix C

### Process

The Taskforce met 9 times between March 2003 and November 2003.

During its deliberations, the Taskforce heard submissions from key stakeholders in the secondary education sector and from NZEI (see Appendix D 'Formal Submissions to the Taskforce' for a full listing).

The Taskforce conducted a survey to obtain the views of secondary teachers, principals and boards of trustees on secondary teacher remuneration now and in the future. Approximately 1,200 individuals responded to the survey.

The Taskforce travelled to three regions to visit schools (Rangitikei College, Cashmere High School and Papakura High School), which collectively represented the broad range of school characteristics in the sector. At these schools the Taskforce met with groups of teachers, principals and boards.

The Taskforce analysed relevant data and research, including reviews of overseas systems and was assisted in its deliberations by a range of technical experts.

The Taskforce released regular progress reports to the sector through stakeholder organisations' websites.

## Appendix D

### Formal Submissions to the Taskforce

	<i>Presentation</i>	<i>Written Submission</i>
• <b>Department of Labour</b> David Grimmond & Patrick Conway	√	√
• <b>State Services Commission</b> David Patterson	√	√
• <b>McBride HR</b> Kevin McBride	√	√
• <b>Minister of Education</b>	√	
• <b>G3 equivalence presentation – PPTA<sup>1</sup></b> Kevin Bunker	√	√
• <b>He Tohu Matauranga presentation – PPTA</b> Kevin Bunker, Te Whare Turuwhenua, Ruroa Hau	√	√
• <b>SPANZ<sup>2</sup> presentation</b> Bali Haque, Paul Ferris	√	√
• <b>NZEI<sup>3</sup> presentation</b> Peter Monteith, Mick Prior	√	√
• <b>He Tohu Matauranga attestation process – MOE</b> Rawiri Brell, Hugh Karena	√	√
• <b>NZSTA<sup>4</sup> presentation</b> Chris France, Colin Davies	√	√
• <b>Principals initiatives presentation – MOE</b> Rowena Phair	√	
• <b>John Hattie presentation</b>	√	√
• <b>Principals Council presentation</b> Liz Welch, Graeme Jarratt, Trevor Bleakley	√	√

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<sup>1</sup> Post Primary Teachers Association

<sup>2</sup> Secondary Principals Association of New Zealand

<sup>3</sup> New Zealand Educational Institute

<sup>4</sup> New Zealand School Trustees Association



	<i>Presentation</i>	<i>Written Submission</i>
<ul style="list-style-type: none"> <li>• <b>NZQA</b> presentation Karen van Rooyan, Martin Eadie, Andrew Kear</li> </ul>	√	√
<ul style="list-style-type: none"> <li>• <b>Ministry of Education</b> presentation Chris Collins</li> </ul>	√	√
<ul style="list-style-type: none"> <li>• <b>PPTA</b> presentation Jen McCutcheon, Rob Willets, Debbie Te Whaiti</li> </ul>	√	√
<ul style="list-style-type: none"> <li>• Report from the Future Forum, held on 2 November 2002 to address the future of Secondary Teachers and Secondary Teaching – Boards of Trustees in the Greater Wellington Region</li> </ul>		√
<ul style="list-style-type: none"> <li>• Various submissions by individuals – G3 issue</li> </ul>		√

## Appendix E

### Documents Tabled

- Profile of Secondary Teacher Workforce – MOE
- The Supply of Teachers for Secondary Schools – MOE
- Secondary Teacher Career Paths – PPTA
- Secondary Teacher Pay 1991 – 2003 – PPTA
- Secondary Staffing 03 Interim Report – PPTA
- Websites of interest
- Comparison of Pay Scales NZ vs OECD<sup>5</sup> countries – PPTA
- Submission to the Alternative Dispute Resolution Panel on G3 Equivalent Teachers 15 January 2003 – MOE
- Characteristics of Highly Effective Teachers – MOE
- Non-salary Remuneration – PPTA
- Developments in Learning and Curriculum and needs of students and schools (current and likely/preferred future) – MOE
- Effective Remuneration Systems – An Overview – MOE
- Review of Teaching and Teacher Education, Interim Report: Attracting and Retaining Teachers of Science, Technology and Mathematics – Committee for the Review of Teaching and Teacher Education
- Recruitment and Retention data – MOE
- Unified Pay Systems: Looking for a model that works for secondary – PPTA
- Performance Pay, Merit Pay and the Secondary Teaching Profession – PPTA
- Bilateral Forums on Secondary Teacher Workload – A Report to the Minister of Education and to the Staffing Review Group – PPTA
- A Background Paper to the Ministerial Taskforce in Workload and Remuneration of Unit Holders

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<sup>5</sup> Organisation for Economic Co-operation and Development

- Recruitment and Retention in New Zealand Secondary Schools: Information from a series of interviews, with a focus on beginning teachers, returning teachers, and heads of departments – MOE
- Review of the Centre – Paper Two – Integrated Service Delivery
- Recommendations of the Schools Consultative Group 1994: Exit Provisions, Career Prospects, Professional Development – PPTA
- Professional Development – Existing Requirements – PPTA
- The Arrangements for Entry and Exit from the Teaching Profession – A Report of the Schools Consultative Group – PPTA
- Salaries in New Zealand - Debbie Graham and Associates - PPTA
- Shifting the Focus: Achievement Information for Professional Learning – NZSTA
- Developing a Qualification discussion paper – NZQA
- Proposed Study in Secondary Teacher Workload – MOE
- Principles for an Advanced Qualification – Taskforce

## Appendix F

### Executive Summary of the Taskforce Survey

(Note: Full survey report is available at [www.minedu.govt.nz/goto/mtfquestionnaire](http://www.minedu.govt.nz/goto/mtfquestionnaire))

This survey was open to all secondary school teachers, principals and board of trustee members. Due to the desires of the survey organisers it was principally an open-ended survey receiving **over 30,000** comments. It is therefore a valuable source of information, which should be “data mined” by various project teams before they start any third party interaction.

Due to the level of education of many of the respondents the comments are both insightful and useful. It is important that this database is used actively to justify the thousands of hours invested by respondents and the staff who populated the database. This summary does not do justice to all the content and is designed to only give an overview of the key issues as the respondents saw them.

#### *The current remuneration system*

Overall there is dissatisfaction with the remuneration system, see summary results on page 5. However, it is difficult to quantify the extent of the issue, as it is common for remuneration type responses to be negative. There were however some clear messages including:

- “There should be exit provisions to assist secondary teachers who feel they can no longer be effective in the classroom” (over 80% agreed or strongly agreed)
- “Assistance with student loan repayments would increase recruitment and retention of high quality teachers” (over 75% agreed or strongly agreed). Such assistance would be very effective as many secondary teachers are paying for professional development out of taxed income
- There is a high level of disagreement with the statement “There is currently an adequate number of units to recognise the range and extent of non-classroom duties” (over 80% disagreed or strongly disagreed)
- There is a high level of disagreement with the statement “The current dollar value of the service increment is sufficient to encourage a teacher to improve qualifications” (over 80% disagreed or strongly disagreed)

#### *Influences on recruitment and retention of basic scale teachers*

Four of the top five factors influencing recruitment and retention for basic scale teachers are all related to their workload and it’s effects (“general workload levels”, “quality of life outside school”, “non-contact time” and “level of administrative workload”). See graphs page 6.

On nearly all the factors raised in this section of the questionnaire (“general workload”, “class size”, “NCEA qualifications workload” etc.) the impact was deemed greater on retention as opposed to recruitment. The only exceptions are

“remuneration on base scale” and “remuneration on entry to teaching” where respondents rated a greater impact on recruitment, as would be expected.

### ***Influences on recruitment and retention of Unit Holders***

Whilst the major issues affecting recruitment and retention of unit holders were again around workload and its effects (“non-contact time”, “general workload levels”, and “quality of life outside school”). The difference between recruitment and retention was less marked. In every case retention was the more significant issue. See graphs page 7.

### ***Thinking about possible changes***

The key messages from the survey about “thinking about possible changes” are as follows:

- in the next decade to ensure a sustainable supply of high quality teachers there needs to be “more pay”, “other payments such as professional development” and “improved working conditions”- these three all received over 1,300 comments each
- specialist non-degree G3 qualifications should be recognised by “grandparenting” (±750 comments out of 1,300)
- He Tohu Matauranga should be recognised by “grandparenting” (±280 comments out of 750)
- student loan costs should be offset by “government contributions/subsidy to teachers in employment provided they work in education for a bonded period” (±990 comments out of 1,500)
- the main salary incentive to encourage teachers into ongoing professional development is “paying course costs” (±670 comments out of 1,400)
- the main non-salary incentive to encourage teachers into ongoing professional development is “providing time off to undertake professional development” (±650 comments out of 1,400)
- the importance of “more non-contact time” was emphasized by respondents (±650 comments out of 1,400) in the recruitment and retention of high quality secondary teachers
- respondents thought that the main additional career path open to secondary teachers were in “other education related roles” such as working for the Ministry of Education (±290 comments out of 1,000)
- “exit pay out” (±850 comments out of 1,300) was the main exit provision respondents thought was necessary for teachers who feel they can no longer be effective in the classroom

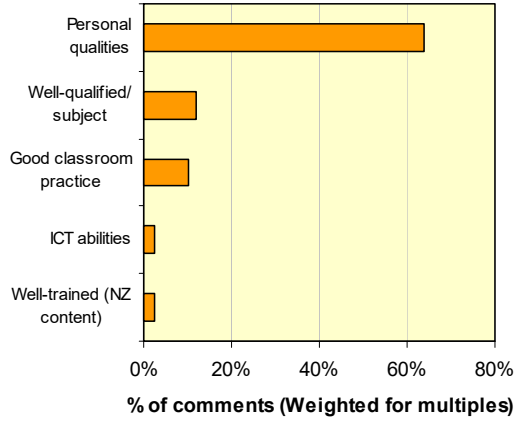
### ***Looking ahead: secondary teaching to 2013***

The most significant issue facing secondary schools in the next decade is “recruitment & retention” (±450 comments out of 1,500).

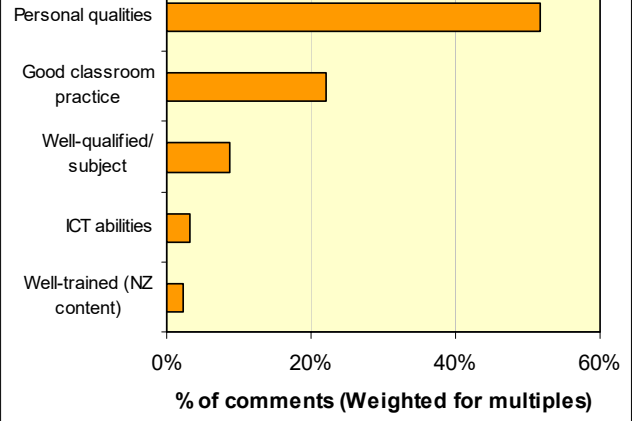
Information and communication technology (ICT) capability (±310 comments out of 1,400) was the most common “necessary knowledge and qualifications for secondary teachers over the next decade”.

The most desirable quality of recruits into secondary teaching over the next decade is “personal qualities” such as flexibility, passion, enthusiasm, creativity, sense of humour, people skills etc. (24,000 comments out of 6,000).

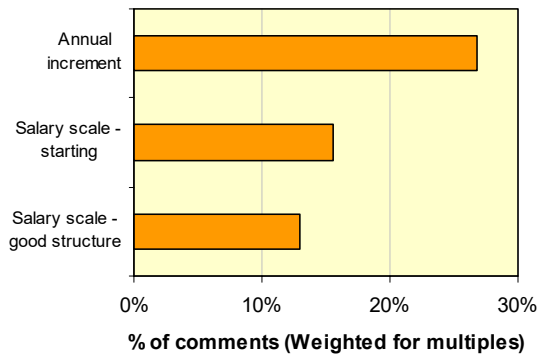
**Over the next decade, what do you think are the five most desirable qualities of recruits into secondary teaching?**



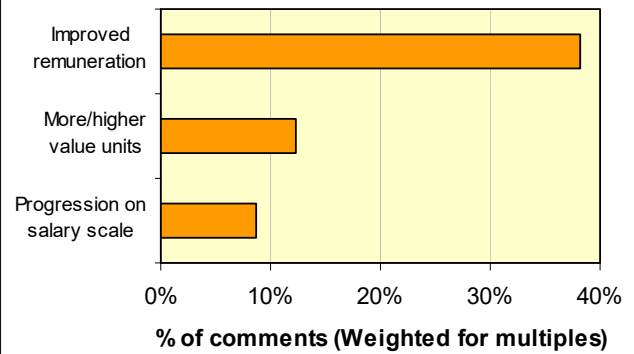
**Over the next decade, what do you think are the five most desirable qualities and practices that should be demonstrated by secondary teachers to maximise learning outcomes for students?**



**What are the three main strengths of the existing remuneration system with regard to recruitment and retention of secondary school teachers?**



**What three main changes to the existing remuneration system would improve the recruitment and retention of secondary school teachers?**



The most desirable qualities and practices that should be demonstrated by secondary teachers to maximise learning outcomes for students over the next decade is “personal qualities” such as flexibility, passion, enthusiasm, creativity, sense of humour, people skills etc. (±2,500 comments out of 5,000).

The main strength of the existing remuneration system with regard to recruitment and retention of secondary school teachers is the “Annual progression” (±440 comments out of 1,700).

The main change, suggested by respondents, to the existing remuneration system to improve the recruitment and retention of secondary school teachers is “improved remuneration” (±1,100 comments out of 2,900).

**Survey method**

This survey was not based on a statistical sample and thus the results are subject to some skewing from disaffected parties. However, due to the high level of

convergence on key issues we believe the results of the survey are a useful indicator of sentiment amongst the respondents.

We recommend that if this survey is to be repeated it is done on a sample basis of say 500 teachers covering all deciles, regions, levels etc. The survey should be converted to a multi choice option with only two questions for open commentary. This can be achieved as all the issues have been clearly identified in this survey.

These changes would significantly reduce the time and expense as well as producing unbiased results.

### *Waymark solutions involvement*

**Waymark solutions** limited were asked to give advice on the final draft questionnaire, survey approaches, and perform analysis on the ratings and the comments.

### *Respondent group breakdown*

<b><u>Respondent Groups</u></b>	<b><u>Un-weighted</u></b>		<b><u>Weighted</u></b>	
Base Scale Teachers	524	39%	524	30%
Teacher with units & assistant HOD	254	19%	254	15%
Head of Department	358	27%	358	21%
Senior Management	67	5%	67	4%
Board of trustees Member	24	2%	24	1%
Group Response	111	8%	498	29%
<b>Total</b>	1338		1725	