



PPTA TE WEHENGARUA ANNUAL CONFERENCE 2024

THE LONG-TERM VISION-BASED APPROACH FOR INDUSTRIAL NEGOTIATIONS

THIS PAPER PROPOSES A LONG-TERM VISION-BASED APPROACH FOR INDUSTRIAL NEGOTIATIONS



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RECOMMENDATIONS

- 1 That the report be received.
- 2 That the Vision Areas and Goals for 2034 be approved.
 - (a) Vision - A well-paid profession
Goals:
 - (i) Base scale rates recruit and retain well qualified subject specialists.
 - (ii) Reliever rates reflect the importance of relieving teachers.
 - (iii) Management and leadership payments reflect the value of the work.
 - (b) Vision - A highly trained workforce
Goals:
 - (i) There is properly funded and relevant PLD for all teachers throughout their career.
 - (ii) Incentives or rewards exist to upskill and use these skills in the classroom.
 - (iii) There is appropriate professional learning for those aspiring to mentoring and leadership roles.
 - (c) Vision - Teachers and school leaders are well supported in their role
Goals:
 - (i) The employer provides the resourcing for teachers to do their job well.
 - (ii) Schools are staffed so that teachers can focus on teaching and learning.
 - (d) Vision – A culturally responsive profession
Goals:
 - (i) There is a culturally responsive secondary teaching workforce.
 - (ii) That the profession operates safely within Te Tiriti.
 - (iii) There is recognition of kaiako matatau ki te reo Māori me ōna tikanga.
 - (iv) There is available, regular and time-resourced upskilling in culturally responsive practices.
 - (v) Schools are resourced for whānau and wider community engagement.
 - (e) Vision – Pastoral care and curriculum are well supported
Goals:
 - (i) Pastoral care and guidance time are staffed at needs level.
 - (ii) Curriculum leaders have sufficient time to effectively perform their curriculum leadership role.
 - (iii) Nationally-directed assessment and curriculum changes are planned, reasonably phased and adequately resourced.
 - (f) Vision – Sufficient and sustainable secondary teacher supply
Goals:
 - (i) There are sufficient, high quality ITE graduates to supply the sector.

- (ii) There are supports for teachers throughout the career pathway to encourage retention through to retirement.
 - (iii) There is a deep pool of qualified day relievers available to all regions.
 - (iv) The particular recruitment needs of Kura kaupapa Māori are addressed.
- (g) Vision –A healthy work-life balance
Goals:
- (i) There are appropriate controls and expectations around workload.
 - (ii) Teachers are supported in looking after their health and family responsibilities.

3 That the collective agreement targets for 2034 be approved:

(a) A well-paid profession:

- Maintain a relativity to the median wage which allows for appropriate recruitment and retention.
- Supervising day relievers are paid at step 8.
- Preparing and delivering day relievers are paid at their actual rate.
- Appropriate relativities are established for units and role-related allowances and maintained.
- An improved system of leadership responsibility recognition.

(b) A highly trained workforce

- Each teacher has an annual dedicated funding allowance for PLD.
- The Service and Qualification is stepped at one MMA value and at unit value.
- There is a PPTA administered PLD fund as part of the collective agreement.
- Unit holders receive the costs of upgrading qualification to Q4 or Q5.
- There are sufficient study awards, study support grants and sabbaticals to ensure that each teacher over the course of their career could access one of each.
- There are mentor-teacher roles established in schools with associated time allowances.
- There is an additional allowance for teachers who hold a recognised adult mentoring qualification.
- Associate teacher payments are at the hourly living wage rate.

(c) Teachers and school leaders are well supported in their role

- Teaching Council fees are centrally funded.
- The mileage payment rate matches the IRD rate.
- All equipment and material is provided by the employer to enable the teacher to deliver a course or programme.
- Each teacher has an entitlement to ancillary support for administrative tasks associated with their teaching.

(d) A culturally responsive profession

- Community liaison roles are fully established, with two hours per week allowance time and remunerated at unit equivalent.

- A cultural leadership role is established and resourced with 0.2 FTTE time allowance and salary of three-unit equivalent.
- There is a payment for recognising high levels of te reo and for gaining and improving qualifications in te reo Māori me ōna tikanga.

(e) Pastoral care and curriculum are well supported

- There are 3,300 pastoral care allowances in secondary schools and a proportionate number in area schools.
- There is a base of two non-contact hours for leadership in addition to time for each permanent unit.
- There is an 18-hour maximum contact load for a full time, fully certificated classroom teacher.
- Class size shall be an average maximum of 25 and the teacher is compensated if this cannot be achieved.
- Each teacher with responsibility for a curriculum or pastoral area has a minimum guaranteed one-hour non-contact time if they do not have a permanent unit.
- Teachers without a unit who have an MMA have ten hours guaranteed allocation of release time to be used over the course of the year.
- The e-teacher and e-dean roles are resourced and referenced in the STCA.

(f) Sufficient and sustainable secondary teacher supply

- EBITE trainees are specifically covered by the STCA for their employment component.
- Supervising day relievers are paid at step 8.
- Preparing and delivering day relievers are paid at their actual rate.
- The options for end of career work have been increased.

(g) A healthy work-life balance

- Leave to attend the birth of their child is up to five days.
- Provisions for role-related health checks.

4 That the STCA and ASTCA claims development for 2025 be based on the Vision approach.

1. CLAIMS DEVELOPMENT

- 1.1 While there are claims that are held over and pursued over multiple negotiations rounds, the strategic approach to each industrial round has largely been a unique event.
- 1.2 The issues this creates for us include:
 - i. It tends to produce many claims that cannot all be achieved in a single round. It is difficult to win multiple high-cost claims without significant industrial action and it slows the negotiations by requiring discussion and support for each claim, even if it is eventually unsuccessful.
 - ii. In the 2022 round we asked members to select between pairs of high-cost claims during the claim development process. Despite that we began with just under 40 individual claims.
 - iii. Our public messaging to explain our negotiations tend to start from scratch each round, which means developing a new campaign each time rather than building on previous campaigns, and although there are often common elements it does require a 'relearning' period for both members and the public.
 - iv. It is difficult for the Association to work on terms and conditions improvements outside bargaining because after one settlement neither PPTA, the Ministry, nor the current or future government parties have a clear picture of what will be asked for in the next negotiation.
 - v. It is difficult for opposition parties to commit to advancing our industrial issues when we are uncertain about what the ask will be when they are returned to power and it is difficult for governments to anticipate funding in budgets for settlements (even if they wanted to) when they do not know what we are claiming prior to the budget being set.
- 1.3 The traditional industrial negotiations also contrast with the period we had following the 2003 Baisley Report, when workstreams were established between PPTA and the MoE to look at issues that had been identified in that report. That process and the relative political stability allowed us to look at issues over a longer timeframe, work between industrial rounds and bring settled items to the collective agreement negotiations for formal offer and acceptance into the collectives. The vehicle for this was the 'Skyline process' a series of Ministry-PPTA-NZSTA working parties that worked on areas of importance to PPTA members from 2004 to 2010. This led to several provisions (e.g. the medical retirement options) that may not have succeeded as traditional claims, or which would have added substantially to the time required to settle agreements.
- 1.4 The Skyline process, underpinned by agreed pay adjustments for each round, gave us an extended period of industrial calm in the sector, but also central to it was the Baisley Report which set out a longer-term approach, a ten-year vision developed with the Ministry of Education and the willingness of members to approve claims based on the outcomes of the working groups.

The Vision-based bargaining framework

- 1.5 In 2021, prior to the industrial round, members developed a vision of where we wanted the profession to be in 2032. The Vision was developed with Te Huarahi and was to be presented to members at the 2021 Annual Conference but was withdrawn (along with all but

the constitutionally required papers) when because of Covid the conference was converted to an online AGM.

1.6 It established five broad priority areas.

1.7 The 2021 Annual Conference recommendation from the paper '*Revisiting Our Vision For Education*'

That PPTA Te Wehengarua use the vision outlined in this paper as the frame by which to promote the 2022 Collective Agreement claims.

1.8 The 2021 Annual Conference paper '*Industrial Strategy 2021-22*' also had to be withdrawn. It argued that:

The work outlined in the vision paper is intended to create a longer-term context in which we can identify and progress the interests of the profession over a period of perhaps three contract rounds.

The strategic framework is effectively the steps to be taken over the next three industrial rounds to progress the goals of the membership vision for education. Not all those steps need to be within the negotiations themselves, but the collective agreement rounds would form key staging posts along the way.

The vision process will identify key areas in which progress is needed. These are likely to be divisible into key themes, perhaps something like:

- *well paid*
- *trained to a high standard*
- *continuously supported*
- *Treaty-led and culturally responsive*
- *properly resourced for curriculum delivery*
- *properly resourced for pastoral care*

Key changes required to bring about improvements in those areas would then be identified and each round would focus on movement in those strategic areas. Each round would see members prioritizing within and across those areas. That allows members to retain control of specific components of each round's claims as well as reaffirm (or adapt) the longer-term vision.

1.9 The arguments were generally accepted in the limited membership consultation we were able to undertake that year and so executive followed the intended recommendations:

- *That the 2021-22 industrial claims be developed within the context of the Membership Vision for Education*
- *Those strategic claims development focus on a phased implementation of key steps in that vision*
- *That strategic claim areas developed with members for 2022 be:*
 - a. *Pay that makes secondary teaching an attractive career*
 - b. *Workload and wellbeing*
 - c. *Treaty-based claims*
 - d. *Professional Development and mentoring*

1.10 In 2022 Executive used the broad Vision statements and placed member claims under those headings for negotiations. This was an intermediate step in developing the long-term approach.

- 1.11 The next step in this process is identifying the long-term outcomes (goals and targets) we would want to see that reflected the broad goals being achieved and, in each negotiation round, more deliberately phasing our claims towards those.

2. WHAT THIS APPROACH DOES

- 2.1 It gives a long-term view of progress towards our goals.
- 2.2 It gives Executive a framework in which to recommend claims to members in each round.
- 2.3 It gives a framework to prioritise members' claims each round.
- 2.4 It gives a framework for continuing to pursue steps towards our goals in alternative forums between negotiations which can then be fed into future settlements.
- 2.5 It offers governments an alternative way of approaching negotiation rounds.
- 2.6 It allows us to identify the end points in our Vision and gives flexibility in how we achieve those.
- 2.7 It provides clarity around important targets that can then be pursued and implemented through industrial negotiations or through other means (e.g. changes to staffing orders, inclusion in government policy etc).

3. WHAT IT DOES NOT DO

- 3.1 It does not lock us into a program of specific claims round by round.
- 3.2 It does not remove members' right to determine and approve the content of the claim for each round.
- 3.3 It does not remove the option for members to change strategic direction in future.
- 3.4 It does not lock in a particular pay claim for the rounds ahead.
- 3.5 It does not require us to place equal weighting on each Vision line in any particular claim development process.
- 3.6 It does not bind future annual conferences.
- 3.7 It will not remove the need for industrial pressure to achieve settlements.
- 3.8 It does not predetermine the nature of our approach to each of the coming rounds.

4. THE ADVANTAGES

- 4.1 Members have already approved the broad Vision.
- 4.2 Members retain control of the goals and see progress within the framework.
- 4.3 Members would still have input into and must give approval for each claim.
- 4.4 There is a place for a potential claim across three industrial rounds, so not including a claim in a particular round does not mean it dies. Anything in the plan can also be worked on outside of negotiations as part of the 2034 horizon.
- 4.5 It offers a process for developing more manageable claims.
- 4.6 It would fit well within the Arbitration Panel proposal for an independent working group on claims (and would give a clear steer for the initial topics that would address). Equally, it would work without it.
- 4.7 It provides a much higher level of predictability for members and for politicians about what we will be expecting over a longer timeframe.
- 4.8 We can continue to work with authority on very specific issues outside of the collective agreement negotiations – echoing the Skyline process of the 2000s.
- 4.9 It would mean greater efficiency in actual negotiations, partly because we would not be introducing completely new claims each time, and partly because we would hope for fewer claims each round.
- 4.10 Over a longer timeframe and within a progressive approach it should be easier to prioritize claims for specific rounds.
- 4.11 The option exists to elect to make large step moves in some Vision targets in one round and smaller moves in others that year.
- 4.12 We retain the flexibility to add or reorder claims if the environment changes, or if we see better ways of achieving the broad goals, to modify the goals and targets.
- 4.13 We can use the process for claims development regardless of which parties are in government and whether they buy into the process.
- 4.14 We can have long term consistency in media and public messaging and campaigning.
- 4.15 It offers the opportunity for opposition parties to buy into improvements more easily.
- 4.16 It offers the opportunity to pursue changes to achieve the goals outside of industrial mechanisms.
- 4.17 It provides a potential pathway through what may be a difficult round ahead.

5. THE RISKS

5.1 Maintaining coherency in a long-term approach:

5.1.1 Any long-term plan requires ongoing commitment from members to the strategy.

- Members may initially feel less control.
Some members may worry that the framework removes some decision making from them. However, members have already agreed the Vision and would collectively have final say on the outcomes that would reflect the achievement of the goals. However, they would still be part of each round of claims development and vote on whether to endorse each claim. They would continue to be the arbiter of whether each settlement was acceptable or not. Ultimately, they could decide at any point to change the strategy for claims development if it is not seen to be working.
- Some members may not see themselves in the long-term vision.
This might include, for example, some who are close to retirement, in specific roles, or with specific issues. Here the key is to see that their issues do fit into the Vision framework at some point, but also that while the Vision is about the whole profession there would still be flexibility for including some small, strategic claims within that Vision.

The recommendation on balance

5.2 Considering these opportunities and risks and with the experience of the successful use of the Vision as claims framework in 2022-23, Executive recommends that a ten-year Vision framework is used as the basis for developing our claims for 2025 with members.

6. PROPOSED GOALS AND TARGETS FOR 2034

6.1 Below is the long-term Vision-based framework proposed by Executive for achieving our Vision by 2034.

6.2 Branches can propose amendments to their region's annual conference delegates via their PPTA regional chair for amendment, in the same way they can propose amendments to the recommendations of this paper.

Note – the targets below are only those that can be enacted through the collective agreements. Work to progress the goals in other forums (workstreams, lobbying for changes to policy, work with other agencies) is not included.

THE VISION FOR 2034	GOALS	COLLECTIVE AGREEMENT TARGETS FOR 2034
A well-paid profession	<ol style="list-style-type: none"> 1. Base scale rates recruit and retain well qualified subject specialists. 2. Reliever rates reflect the importance of relieving teachers. 3. Management and leadership payments reflect the value of the work. 	<ol style="list-style-type: none"> 1. Maintain a relativity to the median wage that appropriately recruits and retain. 2. Supervising day relievers are paid at step 8. 3. Preparing and delivering day relievers are paid at their actual rate. 4. Appropriate relativities are established for units and role-related allowances and maintained.
A highly trained workforce	<ol style="list-style-type: none"> 1. There is properly funded and relevant PLD for all teachers throughout their career. 2. Incentives or rewards exist to upskill and use these skills in the classroom. 3. There is appropriate professional learning for those aspiring to mentoring and leadership roles. 	<ol style="list-style-type: none"> 1. Each teacher has an annual dedicated funding allowance for PLD. 2. The Service and Qualification is stepped at one MMA value and at unit value. 3. There is a PPTA administered PLD fund as part of the collective agreement. 4. Unit holders receive the costs of upgrading qualification to Q4 or Q5. 5. There are sufficient study awards, study support grants and sabbaticals to ensure that each teacher over the course of their career could access one of each. 6. There are mentor-teacher roles established in schools with associated time allowances. 7. There is an additional allowance for teachers who hold a recognised adult mentoring qualification. 8. Associate teacher payments are at the hourly living wage rate.
Teachers and school leaders are well supported in their role	<ol style="list-style-type: none"> 1. The employer provides the resourcing for teachers to do their job well. 2. Schools are staffed so that teachers can focus on teaching and learning. 	<ol style="list-style-type: none"> 1. Teaching Council fees are centrally funded. 2. The mileage payment rate matches the IRD rate. 3. All equipment and material is provide by the employer to enable the teacher to deliver a course or programme. 4. Each teacher has an entitlement to ancillary support for administrative task associated with their teaching.
Culturally responsive profession	<ol style="list-style-type: none"> 1. There is a culturally responsive secondary teaching workforce. 2. That the profession operates safely within Te Tiriti. 3. There is recognition of kaiako matatau ki te reo Māori me ōna tikanga. 4. There is available, regular and time-resourced upskilling in culturally responsive practices. 5. Schools are resourced for whānau and wider community engagement. 	<ol style="list-style-type: none"> 1. Community liaison roles are fully established, given two hours per week time and remunerated at unit equivalent. 2. A cultural leadership role is established and resourced with 0.2FTE time allowance and salary of three-unit equivalent. 3. There is a payment for recognising high levels of te reo and for gaining and improving qualifications in te reo Māori me ōna tikanga.

<p>Properly resourced for Pastoral Care and Curriculum</p>	<ol style="list-style-type: none"> 1. Pastoral care and guidance time are staffed at needs level. 2. Curriculum leaders have sufficient time to effectively perform their curriculum leadership role. 3. That nationally-directed assessment and curriculum changes are planned, reasonably phased and adequately resourced. 	<ol style="list-style-type: none"> 1. There are 3,300 pastoral care allowances in secondary and a proportionate number in area schools. 2. There is an 18-hour maximum contact load for a full time, fully certificated classroom teacher. 3. Class size shall be an average maximum of 25 and the teacher is compensated if this cannot be achieved. 4. There is a base of two non-contact hours for leadership in addition to time for each permanent unit. 5. Each teacher with responsibility for a curriculum or pastoral area has a minimum guaranteed one-hour non-contact time if they do not have a permanent unit. 6. Teachers without a unit who have an MMA have ten hours guaranteed allocation of release time to be used over the course of the year. 7. The e-teacher and e-dean roles are resourced and referenced in the STCA.
<p>A sufficient and sustainable secondary teacher supply</p>	<ol style="list-style-type: none"> 1. There are sufficient, high quality ITE graduates to supply the sector. 2. There are supports for teachers throughout the career pathway to encourage retention through to retirement. 3. There is a deep pool of qualified day relievers available to all regions. 4. The particular recruitment needs of Kura kaupapa Māori are addressed. 	<ol style="list-style-type: none"> 1. EBITE trainees are covered by the STCA for their employment component. 2. Supervising day relievers are paid at step 8. 3. Preparing and delivering day relievers are paid at their actual rate. 4. The options for end of career work have been increased.
<p>A healthy work-life balance</p>	<ol style="list-style-type: none"> 1. There are appropriate controls and expectations around workload. 2. Teachers are supported in looking after their health and family responsibilities. 3. There is support for teachers in emotionally stressful pastoral care roles. 	<ol style="list-style-type: none"> 1. Leave to attend the birth of their child is up to five days. 2. There are provisions for role-related health checks.