

**September 2020**

## Things to know about surplus staffing

Predicted roll and staffing numbers for each school are sent to schools in September.

For most schools real reductions would reflect a pattern of roll change.

Schools can challenge the projections with the Ministry of Education, either arguing for a higher roll to reduce their reduction or a lower one to increase the FTTE reduction the MoE will fund. The MoE indicates that it pays for whole number reductions, but if a school simply cannot manage it can ask for additional support.

The process for challenging your school's provisional roll [is outlined here](#) (education.govt.nz).

The surplus staffing provisions apply to all permanent teachers. Permanent part-time teachers have the same rights in the process as permanent full-time teachers. Teachers in any position, other than that of a first year teacher and the principal, can volunteer for disestablishment or be identified in the CAPNA process. The decisions are made on the expected curriculum, pastoral and management needs of the school in the following year.

A series of decisions must be made by 27 November because the redeployment decisions require two months' notice and must take effect on 27 January.

PPTA field officers automatically facilitate support for schools losing one or more FTTE. They contact these schools by early Term 4 to ascertain whether the school is managing the reduction or requires a surplus staffing meeting.

A nominee of PPTA must be consulted before decisions are made on reduction. Their role is to witness the process and ensure that the board subcommittee follows through on the provisions. They sit in on meetings but do not make decisions.

The surplus staffing provisions and the processes schools must follow to manage down-staffing, units and MMAs are in [clause 3.9 of the STCA](#), and [clause 2.13](#) and [Appendix 5](#) of the ASTCA.

A surplus staffing kit is available through your PPTA field office.

The first step will be to ask staff if anyone is leaving (attrition). The process could end there if those leaving or fixed term positions not being renewed meet the required reduction.

PPTA represents the professional and industrial interests of some 20,000 secondary teachers in state secondary, area, manual training and intermediate schools, as well as tutors in community education institutions, alternative education and activity centres, and principals in secondary and area schools.

The risk with using attrition over the medium to long term is that the school becomes lopsided in its curriculum staffing. Protected schools will have been told by the MoE not to make permanent appointments but the MoE will approve exceptions where a school has to make a vital curriculum appointment - and get approval from the MoE first or risk carrying the cost of one of the reduced positions.

If attrition does not make the required reduction then schools can ask for volunteers. There are sample letters to use in the surplus staffing toolkit. This is usually around October. It is the employer's final decision about whether to accept any individual offer. Schools must give the MoE confirmation of the accepted voluntary offers.

Those who volunteer have three redundancy options, outlined in [clause 3.9 of the STCA](#) and [2.13 of the ASTCA](#). These are: supernumerary employment of a year, long service payment (if they have 25 years of more service – which must be checked before confirming this option) or retraining. PPTA field officers will do a school-based presentation on options and will walk people through them.

Most schools manage the required reduction by attrition and voluntary reduction.

If reductions are still required after voluntary offers have been accepted then a CAPNA meeting is required and this is where PPTA nominees are involved.

Senior leaders need to do a lot of work on the CAPNA to pull all of the data together to help make appropriate decisions. A spreadsheet tool is available from PPTA to assist.

The PPTA nominee discusses what is required, data on staff and staff usage is collected and presented to them to check and then the information goes to a subcommittee of the board, which must have the minuted authority to make decisions on behalf of the board.

ERA Section 4 (good faith) gives those in positions at risk the right to information on which decisions are based and the right to make a submission before a final decision. There is an adjournment of 2-5 days to allow those positions/unit holders to be notified, talk to their field officer and to make a submission. After that the subcommittee reconvenes and confirm its final decisions.

Decisions must be made and notified to the teachers by 27<sup>th</sup> November or schools may incur costs.

For positions disestablished following a CAPNA meeting the employees have an additional redundancy option – a severance payment. Again, the choice of option is the employee's.

A graphic summary of the surplus staffing process [can be found here](#).

A summary of what has to happen in a CAPNA meeting [can be found here](#).