

**PPTA**

NEW ZEALAND POST PRIMARY  
TEACHERS' ASSOCIATION

TE WEHENGARUA

[www.ppta.org.nz](http://www.ppta.org.nz)

# Annual Report 2015 – 2016

**Published by:**

New Zealand Post Primary Teachers' Association  
Te Wehengarua  
PO Box 2119  
Wellington 6140

ISSN 2382-2058 (print)

ISSN 2382-2066 (online - <http://www.ppta.org.nz>)



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## **PPTA constitution**

All PPTA activity is guided by a constitution with the following objectives:

1. To advance the cause of education generally and of all phases of secondary and technical education in particular.
2. To uphold and maintain the just claims of its members individually and collectively.
3. To affirm and advance Te Tiriti O Waitangi.

PPTA's activities include:

- Negotiating collective employment agreements.
- Advising members about conditions of employment.
- Advocating on professional and educational issues.

## **PPTA President Angela Roberts' overview on 2015-2016 year**

As this is my fourth and final year as PPTA president, I want to acknowledge what a privilege it has been to be able to work full-time in the service of the secondary teaching profession.

During that time we have, together, faced some significant challenges: Novopay, charter schools, Investing in Educational Success (IES), collective agreements, vocational pathways, 85% achievement targets, professional development reform, the introduction of the Education Council, a review of school funding and a raft of changes to education legislation.

What these initiatives tend to have in common is that they have been developed in secret in political backrooms by people who have limited, if any, understanding of secondary education and even less idea about how to lead effective change in a diverse and devolved education system. The lever they have is money and more often than not, the agenda is to achieve greater output, regardless of quality, for less investment. Inevitably that translates into pressuring schools and teachers to do more with less.

The 2015 (July) to 2016 (June) PPTA year is illustrative of this theme. After unhelpful delays from the Ministry of Education, the Secondary Teachers' Collective Agreement (STCA) was settled in September without the need for industrial action. While teachers received a much-deserved pay catch up, the complex issues really troubling the sector, workload and teacher supply, had to be transferred to a working party process. The supply group has completed its report and the workload group has just started. The minister has had the supply report for many weeks but, at the time of writing, has yet to release it. This may reflect the fact that the solutions to these two problems are extensive, expensive and require something more strategic than the superficial resolutions that the three-year political cycle normally provides.

It will require leadership that is truly committed to supporting our profession. Workload issues need to be confronted for what they are – barriers to us being able to get on with what we are great at and have been trained and employed to do, which is to provide responsive, engaging learning programmes that give our students the best chance of success. We await the government response with interest.

Following the settlement of the STCA, settlements were reached for secondary school principals, area school teachers and principals and the small group of members who continue to teach in adult and community education (night classes).

PPTA members were delighted with inclusion of central funding of their education council fees in the settlements. It is entirely reasonable that teachers should not have to pay for the operations of this body, especially given the absence of representation. Concerns about the quality of the council's decision making moved PPTA executive to recommend to members that the ban on PPTA engagement with the council be lifted. Members endorsed this position in May 2016. We have since been able to impact on the process of policy development, including new standards. We hope that they are now on a better track with making decisions that will strengthen and support the profession.

The other issue that has continued to be in the forefront this year has been professional learning and development (PLD). This critical and necessary investment in professional effectiveness has been subject to the financial orthodoxy around contracting out and has consequently been atomised and fragmented. Over the last year, the Ministry of Education has been attempting to restore some much needed coherency by involving its new regional directors and, optimistically, the nascent IES communities. Whether this model will go near



replacing the university-led, geographically-based PLD that teachers preferred is yet to be seen. Much of what we need for as subject specialists and NCEA assessment is sorely lacking in this new model but we are hopeful that, with sufficient resourcing and a sensible structure, a new Network of Expertise could hold some promise.

PPTA was pleased to have its position on the Teach First NZ programme confirmed by an employment authority decision in November 2015. The judgement confirmed that all teaching positions must be advertised and appointed on merit.

We have also been active over the last year in building a consensus around the complex issue of school funding – in particular, funding for equity. It has been disappointing to learn that rather than avail itself of the expertise in the sector, the ministry has been developing a number of theoretical and probably unworkable proposals behind closed doors. Unfortunately this looks like becoming another example of an initiative that expects schools to duplicate the miracle of the loaves and fishes. We were involved in an advisory group, in good faith, and are supportive of developing an equity funding model to replace the decile funding. However the proposed delivery mechanism, the Global Budget will be devastating for schools especially together with the changes to the Education Act that is before select committee that will enable the privatisation of schooling. COOLs will provide an online alternative to schooling that will be open to ‘corporate entities’ and will not necessarily require trained and qualified teachers.

I want to put on record PPTA’s thanks to Peter Hughes, who, as secretary for education provided positive leadership to the Ministry of Education, has been supportive of teachers and unions and always made himself available to PPTA to talk through problems.

Lastly, my sincere thanks to PPTA members for their unwavering commitment to PPTA and for their dedication to their students and public education.

## **Foreword to the 2015-2016 annual report: PPTA General Secretary, Michael Stevenson**

This has been another significant year for PPTA with a range of collective agreements settled and continuing activism around the professional issues that are central to the work of secondary teachers.

Membership has remained high which is an achievement in an environment in which governments insist that the gains fought for and won by union members must be handed over to those who are hiding behind the lines, emerging only to share the spoils. One of the claims which PPTA made in the 2015-16 round was for a bargaining fee which would have required that freeloaders pay a sum to the union to acknowledge the cost of the negotiations. While we were not successful with this claim on this occasion, it is clearly an idea whose time has come.



We continue to have to deal with leftover problems from Novopay, now known as Education Payroll Limited (EPL). The Novopay software which they inherited has a tendency to drop members' subscriptions or occasionally re-join teachers who have asked to leave. Most problematic, it is unable to continue the membership of teachers who change schools requiring teachers to firstly notice that they are no longer members, and secondly, to follow-up and re-join.

Despite this membership numbers remain stable. It is very pleasing to see membership and activism rising amongst young and new teachers, as they are the future of the movement.

After a difficult year last year, the PPTA accounts show a solid surplus for the 2015-2016 year, which is reassuring because no union knows when it may be targeted in a government attack and it is important to always have reserves in the event of that happening.

There have also been significant staffing changes in PPTA reflecting the same demographic pattern that exists in the secondary service as baby boomers move into retirement. The association now has a balance of experienced and new staff which should serve it well in the future.

During the year we have had to farewell two stalwart campaigners for PPTA who have both, in their different ways, changed PPTA for the better. Ida Gaskin, who was president in 1976, died at the beginning of the year. Ida was famous for her ferocious intelligence which saw her win Mastermind in 1983, and for her commitment to all students especially those who were economically disadvantaged. In April, Gay Simpkin, who was a PPTA advocate and then deputy general secretary, passed away. Gay served PPTA during the challenging times of the late 1980s early 1990s when the State Sector Act was introduced, Tomorrow's Schools and bulk funding came into being and unions were tied in knots by the Employment Contracts Act.

Members can be pleased with the achievements of PPTA in this last year, with the settlement of the five collective agreements that we are responsible for at a total cost of over \$200 million - excluding the larger amount that flows on to other groups in the sector via relativity claims.



## **PPTA decision-making structures 2015-2016**

This section of the New Zealand Post Primary Teachers' Association/Te Wehengarua (PPTA) annual report for the 2015-2016 year provides a brief introduction to PPTA decision making structures.

### **The PPTA annual conference is its supreme decision-making body**

Business between annual conferences is conducted by the PPTA executive which meets five times a year. Executive comprises volunteers who are practising secondary teachers elected by PPTA members to represent each of the 24 PPTA regions, three representatives from Te Huarahi Māori Motuhake (the Māori executive), and a representative from Komiti Pasifika.

Members also elect the PPTA president, a full-time position based in Wellington, for which the incumbent can take up to four years' leave from his or her school.

The executive is assisted in its decision-making by a number of advisory committees and taskforces which are responsible for providing advice on specific issues of concern to secondary teachers.

## **Membership of PPTA Executive and PPTA groups for the 2015-2016 year** \*\* left January 2016 or earlier / \* from February 2016 / †died during tenure

### [PPTA National Executive](#)

Chris Abercrombie\*, Dave Anderson\*\*, Rodger Barlow, Jay Barr, Jack Boyle, Graeme Bridge, Peter Calvert\*\*, Glenn Cassidy, Ellen Curnow\*, Robin Duff†, Penney Dunckley\*\* Natalie Faitala, Jill Gray, Kendra Greenwood\*\*, Kevin Greig\*, Jacinta Grice, Jonathan Handley-Packham, Vince Hapi\*, Joe Hunter, Henare Hutana, Angela King\*\*, Gazala Maihi, Hazel McIntosh, Lawrence Mikkelsen\*, Vinnie Monga, Austen Pageau, Sue Plyler\*\*, Simon Reid, Angela Roberts, Terry Robson\*, Chris Sherwood\*\*, Graham Sharp\*\*, Graham Smith, Jason Smythe\*\*, Roxie Tauranga-Hudson\*\*, Wiki Te Tau, Rob Torr\*, Melanie Webber\*, Trevor Wilson, Miles Winter

### [Te Huarahi Māori Motuhake](#)

Miriama Barton, Huhana Davis, Vincent Hapi, Henare Hutana, Hori Kaiwai\*\*, Pani Kerehoma, Ameria Kiriwera, Gazala Maihi, Angela Mills-Gage, Charis Rata, Roxie Aloï, Wiki Te Tau, Te Wharekotua Turuwhenua, Duane Allen\*\*, Philip King\*\*, Kui Morrell, Tihi Puanaki\*, Te Aomihia Taua-Glassie, Sonny Tawake, Hana Wijohn\*\*

### **Te Roopu Matua**

Huhana Davis, Joe Hunter, Hori Kaiwai\*\*, Gazala Maihi, Vinnie Monga, Jacinta Grice, Angela Roberts, Kevin Bunker\*\*, Te Wharekotua Turuwhenua, Ameria Kiriwera, Henare Hutana, Te Mākao Bowkett

## **Executive Committees**

### **Management Committee**

Jack Boyle\*, Robin Duff†, Jill Gray\*, Kendra Greenwood\*\*, Jonathan Handley-Packham, Joe Hunter\*, Henare Hutana, Hazel McIntosh\*\*, Angela Roberts, Wiki Te Tau, Trevor Wilson\*\*

### **Curriculum Advisory Committee**

Graeme Bridge, Penney Dunckley\*\*, Jill Gray, Jonathan Handley-Packham, Hazel McIntosh\*\*, Kui Morrell, Angela Roberts, Graham Smith, Te Aomihia Taua, Melanie Webber\*

### **Professional Issues Advisory Committee**

Jay Barr\*\*, Miriama Barton, Jack Boyle, Glenn Cassidy\*\*, Natalie Faitala\*\*, Kevin Greig\*, Vincent Hapi\*\*, Joe Hunter, Charis Rata\*, Simon Reid, Chris Sherwood\*\*, Te Aomihia Taua.

### **Political Strategy Committee**

Chris Abercrombie\*, Roxie Aloï\*, Jay Barr\*\*, Glenn Cassidy, Huhana Davis\*\*, Kevin Greig\*, Pani Kerehoma\*\*, Hazel McIntosh\*\*, Lawrence Mikkelsen\*, Austen Pageau\*, Simon Reid, Angela Roberts

### **Conditions Strategy Committee**

Rodger Barlow, Miriama Barton\*, Jill Gray, Jacinta Grice, Jonathan Handley-Packham, Austen Pageau\*, Sue Plyler, Roxie Tauranga-Hudson\*\*, Wiki Te Tau, Trevor Wilson, Miles Winter

### [Komiti Pasifika](#)

Alvin Chand, Jess Earnshaw\*\*, Natalie Faitala, Thom Faleolo\*\*, Maria Lemalie, Samy Nayagar, Pushpa Reddy\*\*, Knisha Ruland, Sinapi Taea

### **New Zealand Secondary Principals' Council (NZSPC)**

Christine Allen, Jack Anderson, Chris Betty, Catherine Ewing, Linda Fox, Bruce Hart, Stephen Hensman, Richard Katipa\*, Alan Liddle, Rosey Mabin, Alex MacCreadie, Phil

McCreery, Hazel McIntosh\*\*, James Morris, John Paitai, John Russell, Lynlee Smith, Geraldine Travers\*\*, Allan Vester

#### PPA Senior Positions Advisory Committee

Gael Ashworth\*\*, Jay Barr\*, Kevin Byrne, Ivan Davis, Kevin Dean, Philippa Ferguson, Jill Gray, Stephanie Harford, Julie Netzler, Sue Plyler\*\*, Penny Prestidge, Stephen Read, Timothy Tucker, Joel Wilton

#### PPA ICT Advisory Committee

Carolyn Alexander-Bennett, Graeme Bridge, Ben Britton, Glenn Cassidy, Karen Corbin, Manu Corcoran\*, John Creighton, Ellen Curnow, Di Eastwood, Pauline Faiers, Tish Glasson, Alex Le Long\*, Scott Milne, Samantha Mortimer, Salman Qureshi, Jody Reynolds, Sonny Tawake, Jason White\*, Miles Winter

#### PPA Area School Advisory Committee

Bruce Anink, Rodger Barlow\*\*, Graeme Bridge, Alec Campbell, John Lee, Isabel Rangiwānanga

#### PPA Establishing Teachers' Committee

Nathan Bergin\*, Chris Carr\*, Vincent Hapi, Alex Le Long, Lawrence Mikkelsen, Damon Thomas\*, Nathan Thompson, Austen Pageau, Katie Scott\*, Grady Trail

#### PPA Rainbow Taskforce for Safe Schools

Jerome Cargill, Shawn Cooper, Rosie Jones\*\*, Angela King\*, Vinnie Monga, Cecilia Pakinga\*, Charis Rata\*\*, Michael Tarry

#### PPA Women's Network

Linda Adams, Irene Anderson, Jacquie Bowen\*, Elizabeth Brown\*, Morgan Bunny\*, Tonia Calverley, Jane Goodacre, Kathy Gordon, Tamara Hapi\*, Lisa Holden, Joe Hunter, Louise Irwin\*, Angela King\*, Aletta Lamprecht, Bernie Lee, Angela McMinn\*, Beverley McDonnell\*, Sally McGunnigle-Trail, Angela Mills\*, Parwati Reddy\*, Pushpa Reddy, Verity Rowsell-Starkey, Philippa Tinning-Sherwin, Esther van Dyke\*, Jane Walker, Emma Wallis, Pip Tinning, Barbara Williams, Cia Winter

#### **Surplus Staffing Nominees**

Auckland: Rodger Barlow, Ian Duffield, Stuart King, Tom Leonard, Sue Plyler, Trevor Wilson, Michael Tarry

Hamilton: Elizabeth Ross, Niall Pearce, Devendra Naidu

Palmerston North: Richard Armond, Alan Carson, Paul Cutler, Andy Gray, Jill Gray, Bruce Johnson, Eileen Mott, Trudy Reeves, Mark Stewart, Vernon Tile, Jan Torrey, Hamish Wood

Christchurch: Rosemary Adams, Ray Curnow, Jo Fissenden, Pete Gill, Jonathan Handley-Packham, Martin Kane, Bernie Lee, Michael Summerfield, Alastair Townshend, Miles Winter

Dunedin: Chris Abercrombie, Ross Buxton, Tonia Calverley, Terry McNamara, Peter Wilkinson

#### **Earthquake Recovery Taskforce**

Robin Duff†, Maree Furness, Jacinta Grice, Jonathan Handley-Packham, Martin James, Siobhan Murphy\*, Brigid Raymond

#### **Middle Leadership Taskforce**

Graeme Bridge\*, Glenn Cassidy, Karen Gibbs, Anna Heinz, Hazel McIntosh\*\*, Elizabeth Ross, Te Aomihia Taua, Dave Tinker, Catherine Wynne

#### **Workload Taskforce**

Miriama Barton\*, Jack Boyle\*, Karen Corbin\*, Ivan Davis\*, Jess Earnshaw\*, Jill Gray\*, Jonathan Handley-Packham\*, Louise Irwin\*, Erin Macdonald\*, James Morris\*, Louise Towers\*

## **PPTA Regional Officers**

The following groups are office-holders in each of PPTA's 24 regions:

### **Regional Chairpersons**

Rosie Adams\*\*, Martin Kane\*, Michael Tarry, Rae Brown, Brigid Raymond, Sharon Ensor\*\*, Isabel Rangiwananga\*, Janette Snowden, Conan Doyle, Julian Lumbreras, Anne Hubbard\*\*, Desiree Mulligan\*, Alan Carson, Cheryl Nesbit\*\*, Ngaire Searle\*, Anna Heinz, Micky Nogher, Jenny Joynt, Terry Robson\*\*, Graham Sharp\*, Pauline McNeill, Terry McNamara, , Erin MacDonald, David Masters\*\*, Ewan Grant-Mackie\*, Jo Belgrave, Mike van Woerkom\*\*, Morgan Bunny\*, Steven Lee\*\*, Trudy Reeves\*, Vanessa Pringle, Tania Rae

### **Regional Secretaries**

Sarah Robinson, Kathryn Jenkin, Harold Deeley\*\*, Victoria Macann\*, Jo Fissenden, Jeremy Ball, Tom Leonard, Jason Devery, Andrea Sims, Andrea Graham, Rebecca Hopper, Dan Searle\*, Hess Williams, Robyn Weir\*, Delwyn Lawrence\*\*, Kendra Greenwood\*, Diana Henderson, Dave Patchett, Janelle Eason, Trevor Hook\*, Peter McNeil, Hein Laaper, Jane Russell\*\*, Nigel Bailey\*, Trudy Reeves\*\*, Ray Curnow, Kim Whyte

### **Regional Treasurer**

Stephen Ross, Savitri Nadan, Niall Pearce, Sharon Gudsell, Andrew Gray\*\*, Tony Tinworth\*, Stuart King, Jamie Ashman, Chris Hodge, Divendar Nath, Vijeshwar Prasad, Barry Stevenson, Robert Taylor\*\*, Robyn Bright\*, Sue Young, Eileen Parsons, Veronica Gell, Pauline McNeill, Terry McNamara, Jane Gilbert, Jan Collier, Pushpa Reddy, Mike van Woerkom, Vernon Tile, Louise Towers, Tania Rae\*\*, Phil Adams\*

### **Te Reo-a-Rohe**

Naomi Cusack\*\*, Sharon Fernée\*, Tamara Hapi\*\*, Tina Peters\*, Elaina Phillips\*, Mark Snowden\*\*, Mike Murray, Hemi Ferris-Bretherton, Powhiri Rika-Heke, Trish Tangaroa, Mere Manning, Barbara Thomason, Jan Worrall, Jane du Feu, Maria Jackman, Waimarie Paikea (Morgan), Te Puawaitanga Silich, Cherie Ford, Rihari Brown, Tai Huata, Christine Weepu, Kapuhua Waaka\*

### **Regional Establishing Teacher Representatives**

Andrew Williamson\*\*, Susie Matheson\*, Lawrence Mikkelsen\*\*, Paul Stevens\*, Alex Le Long, Nathan Thompson, Isabel Rangiwananga\*\*, Tiffany Allan\*, Gurpreet Kaur\*\*, Katie Scott\*, Pratik Jethwa, Damon Thomas\*\*, Jason Megchelse\*, Chris Carr, Angela McMinn\*\*, Kerry Morgan\*, Katrina Fort, Grady Trail, Bruce Alison\*\*, Marsha Finlay\*, Sean Henwood\*\*, Arran Wilkinson, Janelle Eason\*\*, Chris Abercrombie\*\*, Pip Paulin\*, Ahmad Osama\*\*, Kylie Hickey\*\*, Matt Whibley\*, Charlotte Willson\*\*, Sam Speedy\*, Tom Fanning\*\*, Stacey Morgan\*, Ngarangi Te Riini\*, Ellen Curnow\*\*, Marina Pasichnik\*\*

### **Regional Women's Coordinators**

Lisa Holden, Parwati Reddy\*\*, Kylee Houppapa\*, Kathy Gordon\*\*, Melly Allom\*, Bernie Lee, Aletta Lamprecht, Linda Adams\*\*, Gurpreet Kaur\*, Elizabeth Brown, Beverley McDonnell, Jane Goodacre, Emma Wallis, Angela McMinn, Amanda Ellwood\*, Jacquie Bowen, Sally McGunnigle-Trail\*\*, Fiona Pope\*, Verity Rowsell-Starkey, Esther Van Dyke, Tonia Calverley\*\*, Natalie Tregidga\*, Barbara Williams, Jane Walker, Ann Hoover\*, Louise Irwin\*\*, Faith Tautuhi\*, Morgan Bunny, Angela King, Irene Anderson, Pip Tinning-Sherwin\*\*, Ray Ryan\*

### **Regional Pasifika Coordinators**

Helen Long\*\*, Elaina Smith\*\*, Jess Earnshaw, Joyce Shankar\*\*, Linda Sime\*, Divendar Nath, Vijeshwar Prasad, Devendra Naidu

## **PPTA industrial activity 2015-2016**

### **Secondary Teachers' Collective Agreement (STCA)**

Bargaining for a renewal of the STCA began before expiry on the 30<sup>th</sup> of June but little progress was made. The Ministry of Education eventually made an offer for settlement on the 30<sup>th</sup> of July, just prior to the executive meeting. Executive did not regard it as an acceptable offer but decided to seek members' views. A branch consultation was undertaken in early August confirming that members found the pay offer insufficient and the lack of response from the ministry on other claims unacceptable.

The bargaining team returned to the table but no further progress was made, leading executive to call for paid union meetings in October with an intention of updating members and preparing for industrial action.

In the interim, rapid progress was made meaning that the paid union meetings could be used to seek ratification. The settlement was ratified by a majority of over 90%. The key elements were:

- 2% x 2% x (average of) 2.5% wage increases back-paid to 2 September in each of the three years of the term;
- Education Council fees paid for teachers over a three year term from 1 November 2015 – 31 October 2018;
- Increases to field and mileage allowances;
- Ten more sabbaticals for teachers;
- Resolution over the traditional coverage of Years 7 and 8 technology teachers in primary and intermediate schools;
- Agreement to two high level working groups, one on secondary teacher supply and one secondary teacher workload.

### **Area School Teachers' Collective Agreement (ASTCA)**

The ASTCA is bargained jointly with the New Zealand Educational Institute (NZEI) and usually amalgamates the best of the primary and secondary settlements. It was delayed this time because NZEI had been unable to settle the primary teachers' agreement. Eventually a settlement along the same lines as the secondary settlement was achieved in April 2016.

### **Secondary Principals' Collective Agreement (SPCA)**

The SPCA, which is jointly bargained with the Secondary Principals' Association of New Zealand (SPANZ), was also settled in May with pay increases consistent with those achieved for secondary teachers, reimbursement of education council fees and increased support for principal sabbaticals.

### **Area School Principals' Collective Agreement (ASPCA)**

As is generally the case, the ASPCA was settled soon after the secondary principals' agreement with the same terms and conditions.

## **Adult Community Education Collective Agreement**

Since the removal of funding for night classes over five years ago, the sector has shrunk considerably making collective negotiations very difficult. Despite that, a settlement was reached in June which contained similar increases to the other agreements but delayed in implementation, which reflects the disadvantage of being paid by school bulk funds rather than central payroll.

### **Investing in Education Success (IES)**

The settlements also captured the IES variations completed in 2014. It was a straightforward exercise for the STCA and the SPCA but the area school agreements required negotiations with NZEI because the variations they had developed for primary schools were slightly different. When it proved impossible to merge the provisions, it was determined to include both.

As IES has moved into its implementation phase, the difficulties PPTA predicted have become apparent. There has been a tendency to rush schools into communities without thinking about the strategic implications, there has been central interference with the critical community goal-setting process and there has been inflexibility around community-developed models of management. The biggest problem, perhaps fatal, is that the government would not entertain the possibility of more than one secondary school in a geographical community, meaning that the negative educational consequences of competition will continue.

### **Ongoing Industrial Issues**

#### **Part-time non-contact**

The failure, over successive negotiations, to achieve non-contact time for part-time teachers in the same proportion as full-time teachers, has resulted in a decision to seek redress via legal action in relation to employment equity. PPTA is seeking members who are part-time teachers, who do not have proportional non-contact time and who wish to be involved in the test case.

#### **Teach First New Zealand**

After almost four years of discussions with Teach First and the Ministry of Education over what PPTA believed was a breach of the State Sector Act, the Employment Relations Authority ruled in November 2015:

- Except for short term casual positions, where there is to be an appointment the position must be advertised, and
- The process of advertising and selecting for positions must be open and the employer must act fairly and independently to select the best candidate for the position from the field of candidates.

[Determination of the Employment Relations Authority between NZPPTA and the Secretary for Education and the Vice Chancellor of University of Auckland and the Teach First New Zealand Trust.](#)

Initially, Teach First signalled an intention to appeal the decision but the parties were able to reach a satisfactory solution without further recourse to the courts. Teach First agreed that it would no longer place its participants in schools but would support them to apply for positions in the correct way.

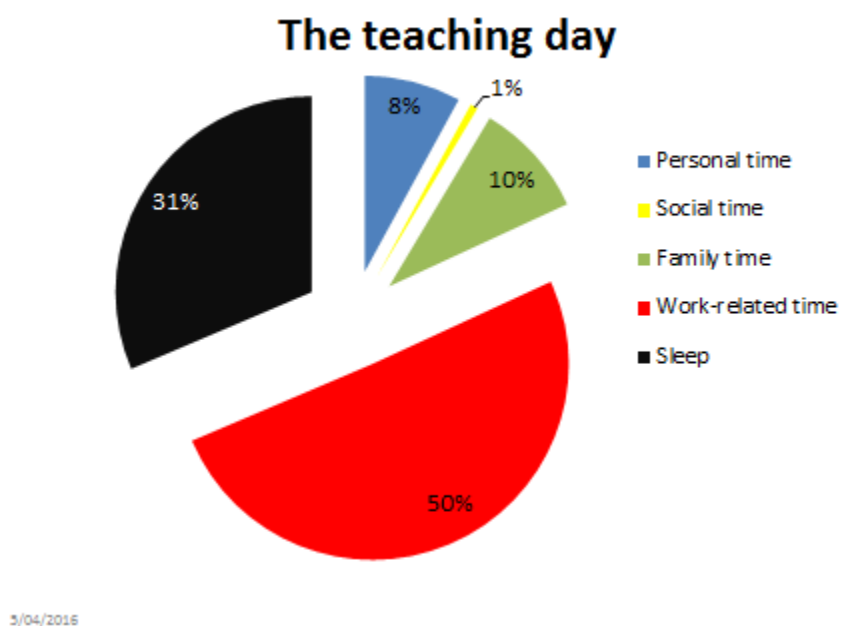
Given this solution, PPTA was surprised and disappointed to learn in June 2016 that the government intended to change the law to enable Teach First to by-pass the State Sector Act. PPTA's submission opposed the changes as being hasty, unnecessary and unfair to other providers but the select committee approved the change anyway.

### **Workload**

The 2015 Annual Conference received reports from both the workload taskforce and the taskforce set up specifically to consider middle leadership workload. Both groups have continued their work into 2016. The middle leadership taskforce, as well as preparing a submission for the general workload taskforce report, surveyed branches in Term one 2016 and used that information to prepare a paper for the 2016 Annual Conference on how to make middle leadership positions more attractive and manageable.

The workload taskforce prepared an extensive report based on surveys and submissions, which was released in April 2016. It noted that the increase in the complexity and the quantum of work in schools is impacting on job satisfaction and on retention and recruitment of both teachers and principals. There was general agreement that NCEA and administration are the main drivers of the increase in workload and that the brunt of this is being borne by middle leaders.

### [Workload Taskforce Report](#)



## Secondary school staffing

### Secondary staffing report 2016

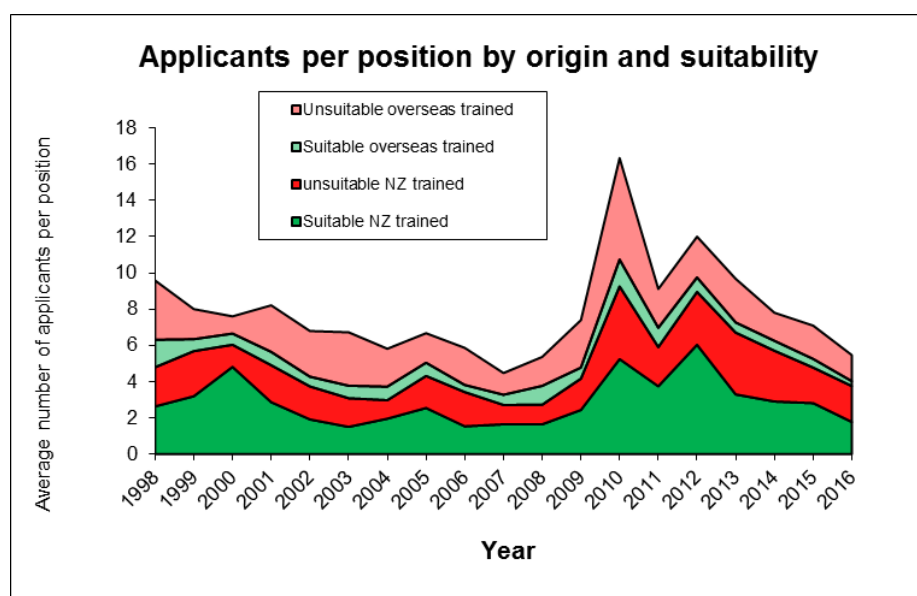
The annual PPTA survey of secondary school vacancies done in March 2016 confirmed the suspicion that shortages are starting to bite. There have been increases in:

- the number of jobs advertised;
- the proportion of unfilled vacancies;
- the number of schools with unfilled vacancies;
- the number of resignations;
- the number of schools that have had to cancel classes or transfer to distance learning; and
- the number of teachers teaching outside their subject areas.

There have been falls in:

- the average number of applicants per position;
- the average number of New Zealand applicants (for the fourth year in a row);
- the average number of suitable applicants; and
- the number in the relief pool (now the lowest since 2003).

#### [Secondary staffing report March 2016](#)



### Supply Working Group

As noted earlier, concerns about teacher supply resulted in an agreement to establish a working group comprising representatives from PPTA, the Ministry of Education and the School Trustees Association (NZSTA). The group was co-chaired by the president of PPTA and a Ministry of Education deputy secretary. It met in the first half of 2016 to gather data about teacher shortages and to propose solutions. At the time of writing, the report has been completed but not released.

As part of its contribution to the debate PPTA prepared a report outlining the theoretical elements of teacher supply.

#### [Theory of secondary teacher demand and supply](#)



## Surplus Staffing

PPTA provides extensive support for schools which have a falling roll and are required to lay off staff. The collective agreements set out the process to be followed and PPTA supplements that with a kit detailing the steps, field office support and members who are trained surplus staffing specialists. The process provides a mechanism whereby employers and employees can work together to identify surplus staff fairly and objectively while endeavouring to protect curriculum delivery in the affected schools.

In 2015, almost 250 secondary, area and intermediate schools were identified as being in need of staffing “protection” which means that the school’s roll drop is such they are predicted to be overstaffed by at least one full-time teacher. In many of these cases the problem resolves itself through attrition or through teachers volunteering to take an exit option. In 2015 the total staffing reduction was 499 fulltime equivalent positions and 615 management units.

## School funding

The 2014-15 annual report noted that PPTA had been active in facilitating an inclusive sector-wide group ([National Education Leaders Partnership or NELP](#)) to build a framework of principles which could underpin the government’s review of school funding.

Despite various attempts by NELP to engage at the ground level with the ministry around the development of a new approach to funding, the ministry determined to undertake the process in isolation. The first evidence of the ministry’s work appeared in the 2016 Budget which introduced the idea of targeted funding for schools based on social data factors which correlated strongly with educational failure: a parent who had been to prison; if they or a sibling had suffered child abuse; if their family had relied on a benefit for a prolonged period; or if the child’s mother had no formal qualifications. PPTA is not opposed to targeting but disagrees that it has to occur within a capped budget which potentially shifts the risk to another group of students.

In May 2016 PPTA was asked to join the [Advisory Group for the Review of the Education Funding System](#). It became immediately clear that PPTA could have no truck with the direction the ministry was proposing to head in. [The proposals](#) include:

- the replacement of base school funding and staffing (which is there to protect curriculum breadth in small schools) with a per student mechanism;
- a return to bulk funding under the new title “global budgeting”; and
- a ring-fencing of property funding at the same time as the Guaranteed Minimum Formula Staffing (GMFS) which ring-fences teacher staffing is to be removed.

At the time of writing, PPTA executive is preparing a response appropriate in terms of the scope and scale to the significance of the threat.

## Political Issues

PPTA continues to pursue the goal of having positive relationships with all political parties. As the National-led government moves to complete its third term some arrogance and complacency is discernible. Despite the heavy lifting done by PPTA in relation to IES, the minister is still inclined to view consultation with unions as an unhelpful inconvenience rather than something that might improve the quality of decision-making. As well as continuing her practice of using her guest spot at PPTA annual conference to berate members, she is on record as having told an Education Council gathering that she looks forward to a future when teachers pay subscriptions to the council rather than to their unions. Public statements like this make sustaining positive relationships a challenge.

## The Education Council

There is no better example of the government's view that all problems in education can be laid at the feet of teachers and their unions than the establishment of the Education Council. Despite the strong message from teachers that they were affronted by the prospect of having to fund an organisation charged with leading them but on which they had no representation, the legislation passed through the House virtually unchanged. The council commenced operations on 1 July 2015.

Earlier in the year, PPTA executive had balloted members on the proposition that they should not accept nomination or appointment to the council, nor should they participate in formal council consultation processes. Members endorsed the terms of the ballot and did not seek to join the council, with one exception which resulted in a PPTA [breach of ethics](#) charge which was subsequently upheld.

PPTA drafted an alternative bill called the Teacher Registration Council with the intention of making it available to opposition parties for the private members' ballot. The draft bill deliberately narrows down the role of the council, to make it more efficient and affordable and restores teacher representation. Members endorsed this bill at the 2015 annual conference.

As the year progressed, concerns were raised about the direction the council was taking on a number of matters, including registration (especially the requirement that teachers who have been provisionally registered for more than six year undertake a refresher course at the cost of \$4,000), the development of new practising teacher criteria and a code of conduct, and a proposal from the minister that the administration of professional learning and development would be transferred from the Ministry of Education to the council. Concerned that member's interests were being compromised by the non-engagement policy, executive determined to ask members to review the element of the ballot proscribing engagement with the council. Members endorsed the change. Executive did not seek to alter the ban on nominations and appointments.

## Charter Schools

There were several significant developments in relation to charter schools over the last year:

- The funding model and contracts for future rounds were changed, in recognition of the excessive up-front funding that the first two rounds of schools received. The new model puts more emphasis on per student funding and less on the fixed component (which meant that small secondary charters in particular had little incentive to grow their rolls).
- A further round of applications for charter schools for 2017 was announced. This round comprised only two schools, bringing the total number of charter schools in 2017 to ten: five opened in 2014, four in 2015, none in 2016 (and one closed) and there will be two at

the beginning of next year. The original claim that there would be at least 60 charters in the next term of government appears misplaced.

- The first stage of the Martin Jenkins evaluation of charter schools has been released. This revealed that most of the innovation that charters were doing was in regard to funding and governance, and that their educational offerings were little different to what could be found in public schools – except for small class sizes.

Members continue to demonstrate their contempt for the policy by refusing to provide support and succour to the schools. This staunch and principled behaviour has sometimes resulted in hostile attacks on PPTA, particularly from the under-secretary for education, David Seymour. This probably reflects his frustration that despite the significant sums of public money going into the initiative, the experiment cannot to be said to be successful.

In May this year, another Northland PPTA branch pushed back against the assumption that charter schools can expect to freely avail themselves of state school facilities. In this case, the charter school wanted access to a fume cupboard although it had already been generously funded for all the facilities required for secondary education. Despite claims that the board's refusal to grant permission was effected through bullying by PPTA, [the board chair was unequivocal](#) that he had not been bullied.

The public were surprised to learn in the May 2016 Budget that more funding had been provided to charter schools in the form of [\\$500,000 for a further group of public figures](#) (on top of the appointees to the authorisation board) to “assist” the schools.

In April 2016 a private member's bill for the abolition of charter schools was drawn from the ballot.

## **Legislation and submissions**

### **Education Act Update**

The minister of education has long signalled an intention to amend the Education Act. In December 2015, the process began with a consultation document. PPTA supported most of the proposals, which were directed at better managing the network of schools, providing greater capacity to intervene in schools that are struggling, and encouraging collaboration.

#### [PPTA submission on the updating of the Education Act 1989](#)

PPTA was disappointed to learn that NZSTA had recommended in its submission on the update that the neither principals nor staff should retain the right to vote on the board of trustees. The Association and Secondary Principals' Council (SPC), in particular, were unequivocal in opposing such an undemocratic move.

#### [Submission on further feedback on the education update](#)

### **Education Legislation Amendment Bill**

The consultation process duly led to the introduction of the Education Legislation Amendment Bill. The PPTA submission cautiously supported the proposals except those related to charter schools. PPTA argued that it was inconsistent to permit public tertiary institutions to profit from private charter schools, inappropriate to apply s79 (about payments to boards of trustees) to charter school sponsors and that it was unreasonable to allow well-funded charter schools access to public school facilities and programmes.

#### [PPTA submission on the Education Legislation Amendment Bill](#)

As has become the expected practice, the bill was reported back to the House on the 30<sup>th</sup> of June with no significant changes despite the expressed concerns of submitters.

### **Select Committee inquiry into special needs students**

In September 2015, PPTA submitted on the Education and Science select committee inquiry into the identification and support for students with dyslexia, dyspraxia, and autism spectrum disorders in primary and secondary schools.

The submission focussed on the lack of support for schools with the identification and management of these conditions when they present in secondary school students.

[PPTA submission to the Select Committee inquiry into students with dyslexia, dyspraxia...](#)

### **The Employment Standards Bill**

PPTA also submitted on the Employment Standards Bill, endorsing the positive elements (in extending paid parental leave and enforcement of minimum enforcement standards) and rejecting those likely to have a negative impact, for example, zero hour contracts.

[Submission on the Employment Standards Legislation Bill](#)

### **Parental Leave and Employment Protection Act (Six months leave)**

The Association has continued its active support for paid parental leave by submitting on the private member's bill and lobbying for it. The campaign has been successful in lifting the leave period to 18 weeks but the most recent attempt to expand the entitlement to 26 weeks fell foul of the government financial veto.

[PPTA submission on the Parental Leave and Employment Protection Act \(Six months leave...\)](#)

### **The Vulnerable Children Act**

Towards the end of 2015, after many months of trying to convince the implementation team for the vulnerable children legislation that schools needed support rather than compliance-based instruction if they were to play their part in reducing child abuse, PPTA wrote to the directorate withdrawing from the group. Fortunately, the concerns were taken seriously and the group recommitted to addressing PPTA concerns, with the result that a more school-friendly process is being set up.

[Letter to the Children's Action Plan Directorate withdrawing from the Framework Design Team and the Workforce Advisory Group](#)

### **Health and Safety at Work Act 2015**

The new health and safety legislation came into force in April 2016. Despite the anxieties it has raised, PPTA's advice to schools has not changed: providing they were already compliant under the previous Act, there should be no need for schools to make changes aside from refreshing and updating their policies. PPTA has been active in providing courses and [advice to schools](#) on how to manage their responsibilities under the Act.

### **PPTA response to the Productivity Commission issues paper: New models of tertiary education**

In May 2015 after a useful meeting with the Productivity Commission, PPTA submitted on its tertiary education report. While PPTA endorsed the commission's concerns about lack of coherency in the sector, the association disagreed with the direction the paper appeared to be heading in – the brave new world of massive online courses and increased competition nationally and internationally.

 [Response to the Productivity Commission Issues paper: New Models of Tertiary Education, May 2016 \(330.83 kB\)](#)

### **Supplementary Order Paper 176, Education Legislation Bill (Teach First)**

Most recently, [PPTA submitted on the Supplementary Order Paper 176](#) opposing its intent which was to enable Teach First NZ to bypass the State Sector Act when placing participants in schools. PPTA argued that the change undermined agreements already reached and was not fair to other providers.

### **Submission on Trans-Pacific Partnership Agreement (TPPA)**

PPTA submitted on this agreement, sharing concerns already expressed by many groups and individuals about the lack of transparency and due process. PPTA also had a particular concern about risks to education services.

[International Treaty examination of the TPPA: PPTA submission \(March 2016\)](#)



## **PPTA Professional Activity 2015-2016: Curriculum and Assessment**

### **NCEA**

The 2015 annual conference paper *The NCEA: Can it be saved?* struck a chord with many members who struggle daily with the problems caused by government undermining of the qualification. Despite this, little effort has been made by the government to address the risks. The 85% Level 2 target remains, credit parity is still an issue, and internal moderation continues to burden teachers in isolated schools and subjects.

The risks are increased by the pressure to move to digital assessment for external standards with NZQA piloting in 2016 digital exams in four Level 1 subjects with volunteer schools. Regrettably, this decision was made against the advice of the Secondary Qualifications Advisory Group, who recommended that NZQA begin with trials to be used as schools' practice exams in 2016, moving to pilots of actual end-of-year exams only after careful evaluation of the trials.

### **Vocational Pathways**

The vocational pathways continue to be a promising initiative that is poorly resourced for implementation and as a result will probably never achieve its full potential.

While there have now been Level 3 achievement standards and Level 3+ qualifications mapped to the six pathways for some time, no decision has yet been made as to the requirements for an award at Level 3. This is disappointing for students who want to build at Year 13 on their success in achieving an award at Level 2.

The ministry's vision for Level 3 study towards vocational pathways continues to emphasise part-time school attendance, with at least two days spent in a tertiary or work placement which plays havoc with secondary school programming. The bulk funding of secondary-tertiary partnerships (STPs) has constrained schools' ability to provide curriculum breadth with negative effects for students who are not on STP courses.

The problem has been compounded by the review of the Level 1 and 2 vocational pathways in 2015, which removed most generic employment-related standards from pathways on the grounds that the MOE intended to develop new ways of recognising these "soft skills". There is little evidence of progress with this, except perhaps the announcement that students will be able to earn some credits from attaining their driver's licence.

### **Positive Behaviour For Learning (PB4L)**

Considerable sums of money have gone into PB4L but with mixed results largely explained by the quality of the implementation in schools. Consequently, PPTA members have always been somewhat divided in their views of the programme. Unlike many initiatives, PB4L was initially well-resourced, staffed and evidence-based; however this has begun to change. PPTA was alarmed to learn that the government plans to significantly increase the number of schools in the programme without increasing the total funding. PPTA's response was to re-establish the behaviour taskforce and it has immediately begun to lobby the ministry to ensure that any changes do not compromise the programmes already running.

### **Special Education**

In December 2015, the minister announced the result of a consultation with a number of groups, including PPTA, into special education provision, and released an action plan that "outlines how the ministry will work with others to improve both frontline services and its sector support and leadership". This project is being described as a [Special Education](#)

[Update](#), and aims to refine and simplify funding provision for students with special education needs. While the need for simplification of what is currently a very complex system of resourcing is not in dispute, the fact that the goal appears to be about making better use of existing money rather than a wholesale injection of new money into the system suggests that it may not be successful. Changes will begin in the second half of 2016.

## **Safer schools**

Over the last few years, PPTA has delivered more than 60 “safer schools for all” workshops across New Zealand schools. The workshops focus on ways for schools to be more inclusive and welcoming of students and other members of the community who are perceived to be different because of their sexual orientation or gender identity. They are presented by members of PPTA’s rainbow taskforce. The taskforce also delivered a workshop at the human rights and health conference held in Wellington in May 2016, and the PPTA president spoke on the topic at the Education International conference in Ottawa in August of the previous year.



The rainbow taskforce has also been active in supporting Pink Shirt Day, which has been gaining more and more participation every year. This year Pink Shirt Day came at the end of a full week of anti-bullying activities kicking off on the 16th May. The week was an initiative of the Bullying Prevention Advisory Group, a collaboration of 17 organisations from education, health, justice and social sectors, including PPTA.

## **Middle leaders**

As noted earlier, a real crisis is developing around recruitment and retention of middle leaders who are central to effective curriculum delivery and assessment practice in secondary schools. As result of a 2015 annual conference paper delineating the issues, the middle leadership taskforce has been engaging with middle leaders in secondary schools to develop a plan that will address the problems that this important group of teachers face.

## **PPTA Professional Activity 2015-2016: Professional Activities**

### **The Education Council**

The political context around the Education Council has been dealt with elsewhere but it has also given rise to some professional concerns. These include:

- The risks of an over-ambitious agenda. As predicted, the Council is launching into ventures such as setting up a “Centre of Leadership Excellence”, while failing to do even the most basic tasks well, such as clearly informing schools about registration changes.
- The Teacher Education Refresh (TER) courses have been pursued with vigour by the Education Council with the result that many part-time and relieving teachers have found themselves unable to renew their practising certificates, and thus work. This has been the source of serious criticism of the council, given that schools are struggling with teacher supply problems. PPTA agreed, when the policy was first mooted in 2011, that teachers who had only ever been provisionally registered for six years despite having every opportunity to move to full certification might need to do refresher courses to upskill. However, the union was very clear that the clock must not start ticking on the six years until the teacher was in a position from which they could achieve full certification, i.e. at least a 0.5 position. The Council has ignored that advice. The difficulties are compounded by the fact that the requirements for being granted an exemption from the TER requirements are unrealistic.

### **Initial teacher education**

Changes to initial teacher education including the Teach First NZ model of employment-based training, the shift to higher level teacher education qualifications, funding changes and greater expectations on teachers in schools to support student teachers led PPTA to present a paper to the 2015 annual conference. This highlighted the issues with the partnership between schools and initial teacher education that is so essential to quality ITE. One of the outcomes of the paper was the establishment of a group of members and representatives of the teacher education providers who have been tasked with developing guidelines about partnerships to facilitate better relationships between all parties.

### **Meetings with teacher educators**

PPTA has continued to facilitate bi-annual meetings with the teacher educator providers where all parties can discuss problems and reflect on the implications of various changes on teacher education. Many of PPTA's big ticket items such as IES, teacher supply, workload, the Education Council and PLD are also central to the work of teacher educators so it is very useful to be able to share understandings and perspectives.

### **Professional learning and development (PLD)**

After years of reviews, experimentation, more reviews and serious criticism from all sides, the Ministry of Education flew into action over PLD at the start of 2016. It has developed a model for delivery that basically relies on ministry regional directors (assisted by a local panel) to ascertain the needs of IES communities and some individual schools and to assess whether those needs are consistent with the PLD priorities already set by cabinet. Following that they will need to find out whether there are any accredited facilitators who are able to deliver on the request. Considering the job insecurity engendered by this new design, it is possible that the supply of facilitators will dry up rapidly.

It has been very clear from the outset that some schools will not get any PLD investment. This is especially likely if they appear sufficiently well-funded to be able to pay for their own.



Delivering the sort of subject-specific PLD which secondary teachers need and deserve will be difficult in this environment. So far the ministry response has been to put its faith in the capacity of the voluntary subject associations to fill the rather large gap, despite protests from the associations that they have no capacity to increase their “heroism levels”. There is also hope that the [Teacher Refresher Course Committee](#) (TRCC), the teacher-led PLD provider that was established by Clarence Beeby, will be able to take over the coordination of a new PLD structure, the “networks of expertise hub”.

## **Well-Being in Schools**

A good example of the TRCC motto that they should offer PLD “by teachers for teachers’ was the course on well-being in schools, organised jointly with PPTA in October. The three day course focussed on the three elements of wellbeing: student, teacher and school. The course brought together a range of practitioners from health, education and police to share their expertise with teachers.

## **Subject Associations**

The subject associations continue to play a central role in supporting secondary teaching but do not always get the support from the ministry that their work deserves. For a number of years PPTA has taken responsibility for organising and coordinating an annual two-day meeting of subject associations where they help each other with common problems and share ideas about how to enhance the support they provide for teachers and. This year’s meeting, held in the Term 1 break, was the best attended yet. Popular topics were digital assessment, workload and changes to PLD.

## **Research**

The research referred to in last year’s annual report has continued into this year. Professor John O’Neill of Massey University was commissioned by NZEI and PPTA to look into the impact of private charities on educational decision-making. John presented some of his findings to the 2015 annual conference. John contrasted the actions of a charity like KidsCan which returns at least 60% of its income to beneficiaries, with Cognition Education which had a 2015 return of \$2.7 million but distributed less than 1% (\$200,000) to beneficiaries.

The report will be available by the end of 2016.

## **PPTA Membership Activity 2015 2016**

### **Nationally-based membership activities**

#### **PPTA Annual Conference**

The supreme decision-making making forum for PPTA is annual conference held in the last week of September and attended by over 100 delegates from the 24 PPTA regions plus Te Huarahi and Executive. At the 2015 conference, members discussed the following papers:

[Middle leadership in crisis](#)

[Constitutional amendments](#)

[EDUCANZ: the current state of play](#)

[Initial teacher education in change: But is it for the better?](#)

[Charter schools: an update](#)

As well as discussing the papers, delegates listened to presentations from Sam Huggard, CTU Secretary, Ross Wilson on the relaunch of [EBS](#) health insurance, Correna Haythorpe, president of the Australian Education Union, Minister of Education, Hon Hekia Parata and Allan Vester, representing Secondary Principals' Council. As well, delegates heard from Professor John O'Neill on the topic of *How charities are shaping education policy in New Zealand*, Prof Stuart McNaughton (Chief Education Science Advisor) on *The uses of evidence in policy making* and Henare Ngaera O'Keefe whose topic was *Relationships are the currency of the future*.

#### **Māori Teachers' Conference**

The seminal event on the calendar for Māori PPTA members and everyone with an interest in Māori education is the Māori Teachers' Conference held annually in Rotorua in the mid-year break. Over 200 members attended the 2015 conference where they heard from a variety of speakers with a focus on those who had made great efforts to improve communities which had often been neglected by government authorities. Speakers highlighted the extent to which care and guidance at a community level leaves lasting impressions on rangatahi and supports the work of teachers.



## **Komiti Pasifika**

Last year was again a busy year for the PPTA Komiti Pasifika with attendance at the CTU Komiti Pasifika Conference giving the opportunity to forge links with other Pasifika unionists in sister unions. Komiti reps attended the CTU biennial conference and were also represented at the CTU women's conference.

Other Komiti Pasifika activity included the Pasifika caucus at the PPTA annual conference and the preparation of a submission around Pasifika teachers' workload for the workload report. Much of 2016 has been spent preparation for the biennial Pasifika Fono held in Auckland in July.

The komiti also supported the visit of Oketi Akauola (Tonga) and Meselinda Meta (Vanuatu) who visited New Zealand in April as recipients of the Alisi Fusi Wightman scholarship which is managed through the Council of Pacific Education (COPE), of which PPTA is a member. The scholarship aims to support Pacific female unionists.

Komiti Pasifika has built some links with a new union forming in Samoa called Samoa First Union. The komiti was active in making a request to the PPTA executive donate money to assist the new union with its start-up costs. The decision was made to contribute \$4,000.

## **PPTA Service Awards**

PPTA service awards are an initiative designed to recognise significant contributions members, or former members, have made to fellow members and the Association through their activism and commitment. In the past year, awards have been conferred on: Graeme Macann, Radne Ardern, Andrea Sims, Amanda Wood, Greer Sydney, Allan Easte, Robin Duff and Penney Dunckley.

## **National Student Teacher Summit**

On the 24<sup>th</sup> of June, PPTA, NZEI and NZUSA organised the second shared student teacher summit. Around 40 student teachers from early childhood, primary and secondary courses attended. These are good opportunities to introduce students to the union and to make them aware of the help that is available to them via union membership.

## **Regional and Branch Activities**

### **Issues and Organising Seminar**

The 2015 Issues and Organising seminar held for the first time in Auckland attracted some 150 enthusiastic and engaged delegates. Speakers included Max Rashbrooke on economic inequality and what it means for teachers, CTU president Richard Wagstaff and UNICEF NZ national advocacy manager, Deborah Morris-Travers. Workshop topics included membership activism, community engagement, Pasifika perspectives, health and safety, precarious work, pay and employment equity and teacher supply.



Recognising the critical role regional chairs play in promoting activism, executive has continued the practice of bringing the 24 regional chairs together for a full-day, at least once a year. This year regional chairs got together in Wellington on Saturday the 18<sup>th</sup> of June and had a useful day reflection on the political and industrial situation and how impacted on individual regions. Regional chairs also meet at annual conference and at the issues and organising seminar.



### **Auckland Activism**

The Auckland region continued with its successful rejuvenation project in 2015. In October, it held a seminar called 24-hour PPTA people which more than 70 activists attended. Among other things, the attendees and undertook “speed dating” on a range of topics including working with principals, using social media and advocating for educational issues. The feedback was very positive encouraging the region to consider whether it should be an annual event.



### **Supporting members in Canterbury**

Canterbury secondary teachers continue to struggle with the impact of the original earthquakes five years ago, and at the same time must cope with continuing tremors. On top of that, many members have had to face the traumatic experience of school closure. Members at Philipstown Technology School are now employed in the merged Te Waka Unua after a period of great uncertainty. For members at Aranui, which is due to be closed at the end of 2016, it has been a difficult year trying to ensure the interests of current students are well served while contemplating the possibility of either winning a position in the new school or redundancy. During the 2013 consultation process, PPTA strongly urged the ministry to use a merger process which provides more certainty for both staff and students. The ministry ignored the advice and, as well, set out such a long time frame for closure that it put the school at risk of curriculum collapse. The process has been considerably more traumatic than it needed to be.

Throughout Christchurch, members continue to deal with high levels of personal stress while at the same time struggling to provide a stable learning environment for their students. Teachers have noted that the students who have lived through the earthquakes and the resultant family stress, require considerable more support.

The PPTA Earthquake recovery taskforce continues to monitor the situation and to provide support and leadership to Christchurch teachers.

### **Network Reviews**

The situation with the school network remains unsatisfactory. Regardless of the legal requirements and regulations, the reality is that new schools are regularly being opened for political reasons when there is no demographic demand locally. This practice weakens the whole network of provision. Over the last year Turakina Māori Girls' College has been subject to the closure process and Hato Petera College is beginning the process. Regrettably they will be replaced with schools that are equally small and vulnerable simply shifting the problem somewhere else.

### **Membership education**

Membership education is critical for ensuring members are well prepared for the roles they play in branches. PPTA constantly updates courses to ensure they meet members' needs and is always keen to develop new courses as appropriate. This year, as well running the three levels of Mahi Tika union training (plus specific Mahi Tika courses for Pasifika teachers and Māori teachers), PPTA has organised courses for Provisionally Certified Teachers and for principals, and is about to embark on some training for members who are staff representatives on boards of trustees.

### **Health and Safety**

In preparation for the application of the Health and Safety at Work Act, from April 2016, PPTA developed a health and safety representative training course. Two staff members undertook health and safety training and became accredited providers able to deliver the course. The demand proved to be much higher than was anticipated so additional courses have been organised and a further staff member has commenced the training. By the end of term two, 2016, PPTA will have trained around 200 representatives.

Given the importance of health and safety training, PPTA has initiated the establishment of a trust in conjunction with some other CTU affiliated unions. The purpose of the trust will be to act as the governance body for the delivery of union health and safety programmes.

### **Communications**

Executive has committed some funding to sprucing up the website prior to preparing for a major change of platform in the next year. This has also dealt with some template security issues.

## **Kaupapa Māori: PPTA 2015-2016**

### **Te Huarahi**

Te Huarahi is the national Māori body elected on an iwi geographical basis by Māori members of the PPTA. Te Huarahi has responsibility for making decisions which impact on Māori members.

Te Huarahi organises and supports the only national professional development for Māori teachers, the annual Māori Teachers' Conference which is held in Rotorua.

Te Huarahi also supports the annual Kapa Haka contest for secondary schools and the national speech contest, Ngā Manu Kōrero, held this year at Te Rauparaha Arena in Porirua in September. PPTA sponsors the annual competition and is proud to have done so since 1965. It provides a wonderful opportunity for students to showcase their considerable talents.

As well as organising these events, Te Huarahi has had a particular focus on Māori teacher workload which appears to have returned to the untenable levels experienced in the 1990s. Like other secondary teachers, Te Huarahi will be looking to some positive outcomes from the ministry/PPTA workload group.



## **PPTA Executive Ethics Committee Activities for the year to 30 June 2016**

### **Introduction**

After more than a decade of inactivity, the PPTA Executive Ethics Committee received three complaints in the year ended 30 June 2016. Jill Gray (Hawkes Bay), Vinnie Monga (Waikato) and Jacinta Grice (Canterbury) composed the committee who investigated all three complaints.

### **Complaint One**

The first complaint related to a member accepting nomination to the newly-formed Education Council contrary to Association policy. This complaint was not upheld, as during the investigation it was discovered that the respondent had received contradictory advice from the Association.

### **Complaint Two**

The second complaint was received after allegations that an Annual Conference delegate had made inappropriate tweets during a key note address. The committee did not uphold the complaint because the speaker was not a “teacher” in terms of the Fourth Schedule 5 (c) of the Association’s Constitution.

### **Complaint Three**

The third complaint was against the same respondent in the first complaint. The complainants alleged the member was still on the Education Council despite having her attention drawn to the result of the member ballot which read, “*That PPTA members be instructed not to accept nomination or appointment to the EDUCANZ Council until the legislation is amended to include elected teacher representatives and union representatives*”.

During the investigation, the respondent resigned her membership and the committee decided to take no further action [Fourth Schedule 21 (a)].

### **Conclusion**

None of the three complaints investigated in the year ended 30 June 2016 were upheld.

## **External Links**

The New Zealand Post Primary Teachers' Association/Te Wehengarua (PPTA) meets regularly with all parties that have an interest in secondary education: political parties, various sections of the Ministry of Education, the New Zealand Qualifications Authority, the Education Review Office, the Education Council and other agencies that have an interest in what happens in secondary schools.

## **Union and Other Agencies**

As well as the other education sector unions, the New Zealand Educational Institute and the Tertiary Education Union, and the wider union movement represented by the Council of Trade Unions, PPTA also keeps in contact with a diverse range of groups such as Business New Zealand, the Industry Training Federation, the Parent-Teacher Association (PTA), the New Zealand School Trustees Association (NZSTA), the Association of Proprietors of Integrated Schools (APIS) and the Independent Schools Education Association (ISEA).

## **Liaison with Other Education Groups and Networks**

PPTA plays an active role in contributing to policy development in education and represents secondary teachers on a number of reference groups such as the: Education Sector Group for PB4L, Area Schools' Association, Alternative Education, The Rural Education Reference Group (REREG), Secondary Qualifications Advisory Group, The Ministerial Cross-Sector Forum, The IES overview group, the Professional Development Review Group, Police & Education Partnership Forum, Bullying Prevention Advisory Group, Payroll Reference Group, NACEW, Rural Education Reference Group, Study Awards, grants and sabbatical panels, School Statistics Monitoring Group, Vocational Pathways Advisory Group, Initial Teacher Education Students' Group, Raise Pasifika, Child Poverty Action Group (CPAG), Tick for Kids, Trans Pacific Partnership Coalition (TPPC), Vulnerable Children Framework Design Team, National Education Leaders Partnership (NELP), Cross-Sector Health and Safety Forum and the Inclusive Education Steering Group, Funding Review Advisory Group.

## **Principals' Representation**

PPTA also has representation on the following groups through the New Zealand Secondary Principals' Council: Police and Education Partnership, PB4L Steering Group, NZ Vice-Chancellors' Subcommittee on University Entrance, Payroll Reference Group, National Education Leaders Partnership (NELP), Scholarship Process Advisory Group, School Statistics Monitoring Committee, Secondary Qualifications Advisory Group, Secondary Principals' Sabbatical Selection Panel, Cross-Sector Health and Safety Forum and the Vocational Pathways Advisory Group, Funding Review Advisory Group.



## **International Union Links**

Internationally, PPTA maintains strong links with our closest union neighbours, the Australian Education Union (AEU) and the various Australian state unions. PPTA presidents are regularly invited to AEU conferences and the AEU president, Correna Haythorpe, was a guest speaker at the PPTA Annual Conference. The General Secretary meets annually with all the secretaries of the Australian teaching unions. Three members of the PPTA establishing teachers group attended an AEU new educators' conference in Hobart in November. PPTA is also a member of the Australian Curriculum Studies Association (ACSA) which is a useful relationship for discussions about curriculum and assessment issues.

## **Education International (EI)**

PPTA is a member of the world education union, Education International. World teaching unions are increasingly working together, networking and sharing resources and research, campaigning on similar themes and promoting public education globally. The role EI plays in ensuring the union voice is heard in the OECD is critically important as the OECD is increasingly advising governments on education policy in relation to funding, national testing and teacher performance. The research the OECD does and the advice it gives often causes PPTA concern because it reflects a narrow neo-liberal economic agenda.

EI is active in mobilising unions in the developed world to support its campaigning for better education provision in developing nations summarised by the slogan "Education for All". It also organises campaigns in support of teachers who are subject to oppression in their home countries.

PPTA was represented by the president and the general secretary at the Education International World Congress held in Ottawa, Canada in July 2015. At that meeting the president was part of an international panel and she spoke about the collaborative relationship PPTA had with the government over IES and noted the contrast with the government's unilateral behaviour around the Education Council.

The president also attended a meeting of the International Summit of the Teaching Profession (ISTP) in Berlin in May and the EI/OECD affiliates meeting in Rome in April.

### [Education International](#)

## **Council of Pacific Education (COPE)**

PPTA also plays an active part in the Council of Pacific Education (COPE) and contributes financially to assist COPE with their union and education projects within the Pacific.

## **UnionAID**

PPTA continues to support the UnionAID project which is a trust set up by the Council of Trade Unions to help overseas workers to organise collectively to improve working conditions, pay and human rights. The main work in this year has been fundraising for new development projects in the Pacific and Asia, including the Myanmar Young Leaders and, more generally, for promoting the work of UnionAID.

### [UnionAID](#)

**Consolidated Financial Statements for the year ending 31 March  
2016**

The following financial statements were prepared by the Financial Services Manager and audited by BDO Wellington.

**Consolidated Financial Statements for the year ending 31 March  
2016**

The following financial statements were prepared by the Financial Services Manager and audited by BDO Wellington.

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**NEW ZEALAND POST PRIMARY TEACHERS' ASSOCIATION (INC)**

**CONSOLIDATED FINANCIAL STATEMENTS**  
**For the year ended 31 March 2016**

## New Zealand Post Primary Teachers' Association (Inc)

### Statement of Financial Performance

For the year ended 31 March 2016

National Office 2015	NZPPTA 2015		Note	National Office 2016	2016 Budget	NZPPTA 2016
<b>INCOME</b>						
9,196,935	9,196,935	Subscriptions (net)	(9)	9,423,500	9,318,400	9,423,500
231,718	251,447	Interest received on Held to Maturity Investments		202,060	260,000	230,241
-	-	Member Benefits		-	-	-
68,290	76,409	Miscellaneous Income		116,871	10,000	119,966
-	-	PPTA News Advertising		3,200	-	3,200
-	-	Gain on Disposal of Assets		-	-	-
<b>9,496,943</b>	<b>9,524,791</b>	<b>Total Income</b>		<b>9,745,631</b>	<b>9,588,400</b>	<b>9,776,907</b>
<b>EXPENDITURE</b>						
1,525,499	1,526,829	Administration & Finance	(14)	1,422,691	1,479,600	1,424,114
1,718,482	1,657,271	General Secretariat	(14)	1,490,554	1,488,500	1,494,723
375,862	375,862	Maori Activities	(14)	384,446	405,000	384,446
3,775,281	3,775,281	Membership Services	(14)	3,638,019	3,655,145	3,638,019
2,169,779	2,169,779	Policy & Advocacy	(14)	2,159,298	2,271,200	2,159,298
186,651	187,276	Depreciation	(6)	146,828	190,000	147,383
-	-	Surplus Staffing Reserve		-	30,000	-
-	-	Mahi Tika Reserve		-	5,000	-
<b>9,751,554</b>	<b>9,692,298</b>	<b>Total Expenditure</b>		<b>9,241,836</b>	<b>9,524,445</b>	<b>9,247,983</b>
<b>(254,611)</b>	<b>(167,507)</b>	<b>NET SURPLUS / (DEFICIT) BEFORE TAXATION</b>		<b>503,795</b>	<b>63,955</b>	<b>528,924</b>
45,910	51,975	Less: Tax Expense	(5)	58,453	62,000	65,635
<b>(300,521)</b>	<b>(219,482)</b>	<b>SURPLUS/(DEFICIT) FOR YEAR AFTER TAXATION</b>		<b>445,342</b>	<b>1,955</b>	<b>463,289</b>

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## New Zealand Post Primary Teachers' Association (Inc)

### Consolidated Statement of Changes in Equity

For the year ended 31 March 2016

<b>National Office 2015</b>	<b>NZPPTA 2015</b>		<b>Note</b>	<b>National Office 2016</b>	<b>NZPPTA 2016</b>
<u>5,902,140</u>	<u>6,868,450</u>	Accumulated Funds Start of year		<u>5,601,619</u>	<u>6,648,968</u>
<u>(300,521)</u>	<u>(219,482)</u>	Total Comprehensive income/(deficit)		<u>445,342</u>	<u>463,289</u>
<u>5,601,619</u>	<u>6,648,968</u>	Accumulated Funds End of Year		<u>6,046,961</u>	<u>7,112,257</u>

## New Zealand Post Primary Teachers' Association (Inc)

### Consolidated Statement of Financial Position

as at 31 March 2016

National Office 2015	NZPPTA 2015		Notes	National Office 2016	NZPPTA 2016
<b>Current Assets</b>					
441,334	866,538	Cash at Bank	2	2,902,685	3,283,565
93,229	147,292	Accounts Receivable	3	19,499	57,420
5,142	5,142	Imprest Advances		5,142	5,142
5,089,568	5,700,186	Investments	7	2,630,000	3,322,468
<u>217,285</u>	<u>217,285</u>	Other Current Assets		<u>262,690</u>	<u>262,690</u>
<b><u>5,846,558</u></b>	<b><u>6,936,443</u></b>			<b><u>5,820,016</u></b>	<b><u>6,931,285</u></b>
<b>Current Liabilities</b>					
432,632	482,468	Trade Creditors		75,116	127,839
960,992	960,992	Employee Creditors	4	757,819	757,819
158,045	158,045	GST Payable		208,479	208,479
60,342	60,342	Accrued Expenses		266,880	266,880
(4,188)	(4,188)	Income tax Payable	5	1,440	1,440
<u>58,221</u>	<u>58,221</u>	Other Current Liabilities		<u>53,847</u>	<u>53,847</u>
<b><u>1,666,044</u></b>	<b><u>1,715,880</u></b>			<b><u>1,363,581</u></b>	<b><u>1,416,304</u></b>
<b>4,180,514</b>	<b>5,220,563</b>	<i>Working Capital</i>		<b>4,456,435</b>	<b>5,514,981</b>
<b>Non Current Assets</b>					
-	-	Investments		250,103	250,103
<u>2,031,123</u>	<u>2,038,423</u>	Property, Plant & Equipment	6	<u>1,905,515</u>	<u>1,912,265</u>
<b><u>2,031,123</u></b>	<b><u>2,038,423</u></b>			<b><u>2,155,618</u></b>	<b><u>2,162,368</u></b>
<b>Non Current Liabilities</b>					
610,018	610,018	Employee Creditors	4	565,092	565,092
<u>610,018</u>	<u>610,018</u>			<u>565,092</u>	<u>565,092</u>
<b><u>5,601,619</u></b>	<b><u>6,648,968</u></b>	<b>Net Assets</b>		<b><u>6,046,961</u></b>	<b><u>7,112,257</u></b>
<b>Accumulated Funds</b>					
<u>5,601,619</u>	<u>6,648,968</u>	Accumulated Funds		<u>6,046,961</u>	<u>7,112,257</u>

On behalf of the Executive

  
**Michael Stevenson - General Secretary**

6 September 2016  
 Date

  
**Angela Roberts - President**

6 September 2016.  
 Date

**New Zealand Post Primary Teachers' Association (Inc)**  
**Cashflow Statement**  
**For the year ended 31 March 2016**

	2016 National Office	2016 NZPPTA	2015 National Office	2015 NZPPTA
<b>Cashflow from Operating Activities</b>				
<i>Cash was provided from:</i>				
Receipts From Customers	9,535,740	9,554,795	10,090,235	10,081,697
Interest received	202,061	230,241	231,718	251,447
Net GST	50,434	50,434	0	0
	<u>9,788,235</u>	<u>9,835,470</u>	<u>10,321,953</u>	<u>10,333,144</u>
<i>Cash was applied to:</i>				
Payments To Suppliers	3,641,591	3,644,658	3,992,082	3,933,726
Payments to Employees	5,820,709	5,820,709	5,710,023	5,710,023
Net GST	-	-	37,492	37,492
Income Tax	52,824	60,006	60,427	66,492
	<u>9,515,124</u>	<u>9,525,373</u>	<u>9,800,024</u>	<u>9,747,733</u>
<b>Net Cash Inflow/ (Outflow) from Operating Activities</b>	<b>273,111</b>	<b>310,097</b>	<b>521,929</b>	<b>585,411</b>
<b>Cash Flow From Investing Activities</b>				
<i>Cash was provided from:</i>				
Sale of Investments	2,209,465	2,127,615	-	-
	<u>2,209,465</u>	<u>2,127,615</u>	<u>-</u>	<u>-</u>
<i>Cash was applied to:</i>				
Purchase of Investments	-	-	177,372	198,871
Purchase of Fixed Assets	21,225	20,685	79,957	81,498
	<u>21,225</u>	<u>20,685</u>	<u>257,329</u>	<u>280,369</u>
<b>Net Cash Inflow/(Outflow) from Investing Activities</b>	<b>2,188,240</b>	<b>2,106,930</b>	<b>(257,329)</b>	<b>(280,369)</b>
<b>Net Increase/ (Decrease) in Cash Held</b>	<b>2,461,351</b>	<b>2,417,027</b>	<b>264,600</b>	<b>305,042</b>
Opening Bank	441,334	866,538	176,734	561,496
<b>Closing Bank</b>	<b><u>2,902,685</u></b>	<b><u>3,283,565</u></b>	<b><u>441,334</u></b>	<b><u>866,538</u></b>
<b>Bank Consists of:</b>				
Bank of New Zealand Cheque Account	973,554	973,554	439,591	439,591
Bank of New Zealand Current Account	135	135	1,609	1,609
Kiwibank - Current Account	905,990	905,990	-	-
Kiwibank Call Account	300,511	300,511	-	-
National Bank Current Account	722,495	722,495	134	134
Regional Bank Accounts	-	380,880	-	425,204
<b>Total Cash at Bank</b>	<b><u>2,902,685</u></b>	<b><u>3,283,565</u></b>	<b><u>441,334</u></b>	<b><u>866,538</u></b>



# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2016

### 1 Summary of Significant Accounting Policies

#### Reporting Entity

New Zealand Post Primary Teachers' Association (Inc) ("NZPPTA") is an association incorporated in New Zealand under the Incorporated Societies Act 1908. NZPPTA operates as a trade union for post primary teachers in New Zealand. These financial statements are for New Zealand Post Primary Teachers Association (Inc) which comprise the separately disclosed National Office and the regional financial statements.

These financial statements have been prepared in accordance with the Incorporated Societies Act 1908.

#### Measurement Base

The accounting principles recognised as appropriate for the measurement and reporting of earnings and financial position on a historical cost basis are followed by NZPPTA.

These financial statements have been prepared in accordance with New Zealand Generally Accepted Accounting Practice ("NZGAAP"). They comply with Public Benefit Entity International Public Sector Accounting Standards ("PBE IPSAS") and other applicable Financial Reporting Standards, as appropriate for Tier 2 (Not for Profit) public benefit entities, for which all reduced disclosure regime exemptions have been adopted.

The financial statements have been prepared using accounting policies and disclosures as are appropriate for a public benefit entity.

The information is presented in New Zealand dollars.

#### Specific Accounting Policies

The following specific accounting policies which materially affect the measurement of financial performance and financial position have been applied:

##### a) Accounts Receivable

Accounts Receivable are stated at their estimated net realisable value; being cost less impairment losses.

##### b) Consolidation of Regions

The Regions of the NZPPTA are consolidated with the National Office using the purchase method.

All significant transactions between Regions and the National Office have been eliminated.

If a Region has not submitted their financial statements for inclusion in the NZPPTA accounts, the prior period balance sheet figures are carried forward. Statement of Financial Performance figures are recorded in subsequent financial statements when received. The absence of some Regions in any year does not have a material effect on the financial statements.

##### c) Goods and Services Tax

These financial statements have been prepared on a GST exclusive basis, except that Accounts Receivable, Accrued Income, Accounts Payable and Accrued Expenses are stated inclusive of GST.

##### d) Employee Benefits

Provision is made for staff entitlements provided in the Staff Collective Agreement currently in force.

An obligation is recognised when the employee provides the service in exchange for the benefit even though the benefit might only vest and be payable in the future.

The provision for annual leave is calculated on an actual and anticipated future entitlement basis at current and projected rates of pay.

Sick pay is accrued only where a known liability in excess of annual sick leave entitlement is probable.

The provision for long service leave and retirement leave is calculated on the projected unit credit method, bringing to account the current estimate of future payments in respect of service that employees have accumulated at balance date. The obligation is discounted to present value using the yield on equivalent term Corporate Bonds.

NZPPTA makes contributions on behalf of employees to superannuation schemes. These are designated as "Defined Contribution Plans" in terms of NZ IAS 19.44, and the expense is recognised as the obligation to make contributions on behalf of employees is incurred.

Other employee entitlements are accounted for when due or when a known or anticipated liability exists.

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2016

### e) Property, Plant & Equipment

Items of property, plant & equipment are stated at cost less accumulated depreciation. Depreciation is calculated on all assets on a straight line basis, which are expected to reduce carrying values to estimated residual values over the useful lives of the assets.

The broad category rates at which assets are depreciated are:-

Buildings	3.0%
Building alterations	7.8%
Computers	36.0%
Motor Vehicles	21.6%
Office Equipment	28.8%
Furniture & Fittings	12.0%

When an item of property, plant and equipment is disposed of, any gain or loss is recognised in the Statement of Financial Performance and is calculated as the difference between the sale price and the carrying value of the item

### f) Taxation

The income tax expense charged to the Statement of Financial Performance includes both the current year's provision and any other over or under provision for prior years.

The Organisation's income from members is tax exempt in accordance with the Income Tax Act 2007. Any Income other than this is taxable and is provided on the taxes payable method.

### g) Operating Leases

Operating lease payments are included in the Statement of Financial Performance in equal instalments over the period of the lease.

### h) Financial Instruments

Financial instruments are recognised in the balance sheet when NZPPTA becomes party to a financial contract. They include cash balances, receivables, payables, and investments in and loans to others.

Non-derivative financial instruments are initially recognised at fair value. Financial assets are derecognised if NZPPTA's contractual rights to the cash flows expire or if the association transfers the financial asset to another party without retaining control. Financial liabilities are derecognised if NZPPTA's obligations under the contract expire or are discharged or cancelled.

Cash and cash equivalents comprise cash balances and call deposits.

### i) Investments

Investments are limited to term deposits with major trading banks. A term deposit is classified as an Investment when it has a maturity at acquisition greater than 3 months. Investments with less than 12 months to maturity are recognised as Current.

### j) Budget Figures

The budget figures are those approved by the Executive at the beginning of the financial year. The budget figures have been prepared in accordance with NZ GAAP and are consistent with the accounting policies adopted by the Executive for the preparation of the financial statements.

### k) Revenue Recognition

All income is recognised when earned and is reported in the financial period to which it relates. All overseas income has been brought into account in the New Zealand dollar equivalent ruling as at the date such income was derived.

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2016

### **l) Impairment**

The carrying amounts of the NZPPTA's assets are reviewed at each balance date to determine whether there is any indication of impairment. If any such indication exists, the assets recoverable amount is estimated.

If the estimated recoverable amount of an asset is less than its carrying amount, the asset is written down to its estimated recoverable amount and an impairment loss is recognised in the Statement of Financial Performance

Estimated recoverable amount of assets is the greater of their fair value less costs to sell and value in use. Value in use is determined by estimating future cash flows from the use and ultimate disposal of the asset and discounting these to their present value using a pre-tax discount rate that reflects current market rates and the risks specific to the asset. For an asset that does not generate largely independent cash inflows, the recoverable amount is determined for the cash-generating unit to which the asset belongs.

### **m) Judgements, Estimates and Assumptions**

The preparation of financial statements in conformity with NZGAAP requires management to make judgements, estimates and assumptions that affect the application of policies and reported amounts of assets and liabilities, income and expenses. These estimates, judgements and assumptions are based on historical and other factors that are believed to be reasonable under the circumstances. Actual results may differ from these estimates.

The estimates and underlying judgements are reviewed on an ongoing basis. Revisions to accounting estimates are recognised in the period in which the estimate is revised if the revision affects only that period, or in the period of the revision and future periods if the revision affects both current and future periods.

Judgements made by management in the application of NZGAAP that have significant effect on the financial statements and estimates with a significant risk of material adjustment in the next year relate to the following in particular:-

- Employee long service entitlements
- Recoverable amount on account of receivables
- Provisions and contingencies

### **Changes in Accounting Policies**

During the year NZPPTA transitioned from NZIFRS (RDR) to PBE IPSAS (RDR). There were no changes in the measurement or recognition of any financial statement areas and all policies have been applied on basis consistent with the prior year.

## New Zealand Post Primary Teachers' Association (Inc)

### Notes to the Financial Statements

For the year ended 31 March 2016

	2016 \$	2015 \$
<b>2 Cash at Bank</b>		
Bank of New Zealand Cheque Account	973,554	439,591
Bank of New Zealand Current Account	135	1,609
Kiwibank - Current Account	905,990	-
Kiwibank Call Account	300,511	-
National Bank Current Account	722,495	134
<b>Total Cash at Bank at National Office</b>	<b>2,902,685</b>	<b>441,334</b>
Plus - Cash at Bank held by Regions	380,880	425,204
<b>Total Cash at Bank</b>	<b>3,283,565</b>	<b>866,538</b>

<b>3 Accounts Receivable</b>		
Balances outstanding	40,997	114,727
Provision for doubtful debts	(21,498)	(21,498)
<b>Total accounts Receivable by National Office</b>	<b>19,499</b>	<b>93,229</b>
Accounts Receivable by Regions	37,922	54,062
<b>Total Accounts Receivable</b>	<b>57,421</b>	<b>147,291</b>

The provision for doubtful debts is considered adequate provision for non-collectible accounts.

<b>4 Employee Creditors</b>		
Annual Leave	422,522	476,899
Long Service Leave	361,379	374,868
Retirement Leave Accrual	481,593	520,030
Other Employee benefits and accruals	57,417	199,215
	<b>1,322,911</b>	<b>1,571,012</b>

Included in employee creditors are amounts due to the IRD for PAYE and ACC.

Employee Creditors are disclosed as follows:-

Current Liability	757,819	960,993
Non-Current Liability	565,092	610,019
	<b>1,322,911</b>	<b>1,571,012</b>

5 Income Tax	2016 National Office \$	2016 NZPPTA \$	2015 National Office \$	2015 NZPPTA \$
<b>Recognised in the Income Statement</b>				
Surplus (deficit) for the year	528,185	553,311	532,361	(113,991)
Tax at 28%	147,892	154,927	149,061	(31,917)
Imputation Credits on Investment Income				
Permanent and Timing Differences	89,439	89,292	117,201	83,652
Prior Period Taxation Refund				
Income Tax Expense	<b>58,453</b>	<b>65,635</b>	<b>266,262</b>	<b>51,735</b>

Permanent differences arise because much of NZPPTA's activities are tax exempt.

#### Current Income Tax Payable/(Receivable)

Opening Balance	(4,188)	(4,188)	10,329	10,329
Use of Money Interest			-	-
Refunds Received			-	-
Tax adjustments	1,720	1,720	(15,279)	(15,279)
Current Taxation	56,733	63,915	61,189	67,014
Prior Year Final Tax Instalment			(1,478)	(1,478)
Current Year Tax Paid	(6,393)	(6,393)	(20,263)	(20,263)
Resident Withholding Tax Paid	(46,431)	(53,613)	(38,686)	(44,511)
	<b>1,441</b>	<b>1,441</b>	<b>(4,188)</b>	<b>(4,188)</b>

## New Zealand Post Primary Teachers' Association (Inc)

### Notes to the Financial Statements

For the year ended 31 March 2016

#### 6 Property, Plant & Equipment

	Cost	Accumulated Depreciation	2016 Book Value	2016 Depreciation
	\$	\$	\$	\$
Buildings - Willis Street Premises	2,260,000	673,662	1,586,338	67,800
Buildings - President's Apartment	381,335	132,582	248,753	13,971
Computers	1,069,899	1,033,068	36,831	49,162
Office Equipment	403,198	395,839	7,359	7,225
Furniture & Fittings	284,389	269,848	14,541	7,919
Furniture & Fittings - President's Apartment	32,377	21,225	11,152	751
<b>Total National Office</b>	<b>4,431,198</b>	<b>2,526,224</b>	<b>1,904,974</b>	<b>146,828</b>
<b>Regional Offices - Total</b>	<b>104,404</b>	<b>97,654</b>	<b>6,750</b>	<b>555</b>
<b>Total NZPPTA</b>	<b>4,535,602</b>	<b>2,623,878</b>	<b>1,911,724</b>	<b>147,383</b>

	Cost	Accumulated Depreciation	2015 Book Value	2015 Depreciation
	\$	\$	\$	\$
Buildings - Willis Street Premises	2,260,000	605,862	1,654,138	67,800
Buildings - President's Apartment	378,414	118,611	259,803	13,763
Computers	1,057,340	983,907	73,433	86,337
Office Equipment	400,884	388,614	12,270	7,251
Furniture & Fittings	283,461	261,930	21,531	11,400
Furniture & Fittings - President's Apartment	30,420	20,475	9,945	0
<b>Total National Office</b>	<b>4,410,519</b>	<b>2,379,399</b>	<b>2,031,120</b>	<b>186,551</b>
<b>Regional Offices - Total</b>	<b>104,862</b>	<b>87,559</b>	<b>7,303</b>	<b>625</b>
<b>Total NZPPTA</b>	<b>4,515,381</b>	<b>2,476,958</b>	<b>2,038,423</b>	<b>187,176</b>

#### President's Apartment

During the year, NZPPTA were advised of a weathertightness problem at the President's Apartment building located at 8 Church Street Wellington. The NZPPTA share of the estimated cost of repairs is \$250,000. The building has a depreciated book value of \$248,753. This compares to recent sales of equivalent apartments at 8 Church Street of \$250,000 where the weather tightness problem has been disclosed. The apartment is currently rented with a rent consistent with a \$250,000 valuation. Once repaired, we expect the cost of repairs will be recouped in a higher valuation. On this basis we do not consider the book value of the President's Apartment to be impaired.

#### 7 Investments

	2016	2015
	\$	\$
Term Deposits	2,880,103	5,089,568
<b>National Office</b>	<b>2,880,103</b>	<b>5,089,568</b>
<b>Regions</b>	<b>692,468</b>	<b>610,618</b>
<b>Total NZPPTA</b>	<b>3,572,571</b>	<b>5,700,186</b>

	2016 National Office	2016 NZPPTA	2015 National Office	2015 NZPPTA
	\$	\$	\$	\$
Investments are disclosed as follows:-				
Current	2,630,000	3,322,468	5,089,568	5,699,382
Non-Current	250,103	250,103	-	-
	<b>2,880,103</b>	<b>3,572,571</b>	<b>5,089,568</b>	<b>5,699,382</b>

These are "held to maturity" financial assets, being non-derivative financial assets with fixed or determinable payments and fixed maturity dates that NZPPTA has the positive intention to hold to maturity. The term deposits are invested at interest rates ranging from 3.23 % to 4 %p.a. and have maturity dates ranging from six months to 18 months.

#### 8 Operating Leases

	2016	2015
	\$	\$
The association has the following operating lease commitments:		
Within one year	242,554	258,636
One to two years	141,879	204,310
Two to five years	124,497	161,212
Over 5 years	0	0
	<b>508,930</b>	<b>624,158</b>

The operating leases are of a non-cancellable commercial nature and are on normal commercial terms and conditions.

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2016

### 9 Financial Instruments

Exposure to credit, interest rate and liquidity risk arise in the ordinary course of operations for NZPPTA. Revenue and expenses in relation to financial instruments are recognised in the Statement of Financial Performance. The fair value of financial instruments is equivalent to the carrying amount disclosed in the Balance Sheet.

Concentrations of credit risk include the Association's banking arrangements and accounts receivable. Most funds are held with Kiwibank, the Bank of New Zealand and with the ANZ Bank. Management reduces counterparty, credit and currency risk by spreading its investments amongst reputable financial institutions.

### 10 Contingent Liabilities

There are no known material contingent liabilities as at 31 March 2016 (2015: nil).

### 11 Capital Commitments

There are no known capital commitments as at 31 March 2016  
There were no known capital commitments as at 31 March 2015

### 12 Financial Instruments Classification

#### National Office

	2016		2015	
	Loans and Receivables	Liabilities at Amortised Cost	Total Carrying Amount	Total Carrying Amount
<b>Assets</b>				
Cash and Cash Equivalents	2,902,685	-	2,902,685	441,334
Investments	2,630,000	-	2,630,000	5,089,568
Trade and Other Receivables	218,036	-	218,036	205,046
<b>Total Current Assets</b>	<b>5,750,721</b>	<b>-</b>	<b>5,750,721</b>	<b>5,735,948</b>
Other Investments	250,103	-	250,103	-
<b>Total Non-Current Assets</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total Assets</b>	<b>6,000,824</b>	<b>-</b>	<b>6,000,824</b>	<b>5,735,948</b>
<b>Liabilities</b>				
Trade and Other payable	-	346,603	346,603	445,727
<b>Total Current Liabilities</b>	<b>-</b>	<b>346,603</b>	<b>346,603</b>	<b>455,727</b>
Long Term Other Payables	-	-	-	-
<b>Total Liabilities</b>	<b>-</b>	<b>346,630</b>	<b>346,630</b>	<b>455,707</b>

#### NZPPTA

	2016		2015	
	Loans and Receivables	Liabilities at Amortised Cost	Total Carrying Amount	Total Carrying Amount
<b>Assets</b>				
Cash and Cash Equivalents	3,283,565	-	6,856,136	866,538
Investments	3,322,468	-	-	5,700,186
Trade and Other Receivables	255,960	-	255,960	259,109
<b>Total Current Assets</b>	<b>6,861,993</b>	<b>-</b>	<b>7,112,096</b>	<b>6,825,833</b>
Other Investments	250,103	-	-	-
<b>Total Assets</b>	<b>7,112,096</b>	<b>-</b>	<b>7,112,096</b>	<b>6,825,833</b>
<b>Liabilities</b>				
Trade and Other Payables	-	399,325	399,325	572,909
<b>Total Current Liabilities</b>	<b>-</b>	<b>399,325</b>	<b>399,325</b>	<b>572,909</b>
Long Term Other Payables	-	-	-	-
<b>Total Liabilities</b>	<b>-</b>	<b>399,325</b>	<b>399,325</b>	<b>572,909</b>

### 13 Key Management Personnel

	2016	2015
<b>Full Time Equivalents</b>		
Executive	2.55	2.55
Management Staff	3.00	3.00
<b>Total Remuneration</b>	<b>653,639</b>	<b>637,814</b>

14 Detailed Schedule of Expenses

National Office 2015	NZPPTA 2015		National Office 2016	Budget 2016	NZPPTA 2016
<b>ADMINISTRATION EXPENSES</b>					
104,012	104,012	Building Expenses	98,758	105,000	98,757
361,066	361,106	General Expenses	352,872	353,200	352,871
147,889	147,889	Information Technology	117,617	101,000	117,617
892,125	892,125	Staff Costs	832,469	898,400	832,469
20,407	20,407	Audit Fees-National Office Auditors	20,975	22,000	20,975
-	-	Other Services National Office Auditors	-	-	-
-	-	Loss On Sale Of Fixed Assets	-	-	-
-	1,290	Audit Fees Other firms	-	-	1,423
<b>1,525,499</b>	<b>1,526,829</b>	<b>TOTAL ADMINISTRATION EXPENSES</b>	<b>1,422,691</b>	<b>1,479,600</b>	<b>1,424,112</b>
<b>GENERAL SECRETARIAT</b>					
148,736	148,736	Annual Conference	157,406	165,500	157,406
211,151	211,151	Executive Expenses	188,811	188,500	188,811
185,348	185,483	General Expenses	101,850	77,600	101,849
220,831	220,831	President's Expenses	201,782	204,400	201,782
-	-	Special Groups	-	4,500	-
353,461	292,115	Regional Expenses	344,752	356,000	348,922
381,438	381,438	Staff Costs	290,061	286,400	290,061
-	-	Whaea & Kaumatua	-	3,000	-
217,517	217,517	External Relations	205,892	202,100	205,892
-	-	Special Projects	-	500	-
<b>1,718,482</b>	<b>1,657,271</b>	<b>TOTAL GENERAL SECRETARIAT</b>	<b>1,490,554</b>	<b>1,488,500</b>	<b>1,494,723</b>
<b>MAORI ACTIVITIES</b>					
37,270	37,270	Te Huarahi Huis	46,311	45,000	46,311
5,490	5,490	Te Huarahi Conferences	35	5,000	35
4,716	4,716	Te Reo A Rohe	7,164	10,000	7,164
54,629	54,629	Maori Teachers' Conference	67,075	75,000	67,075
2,867	2,867	Maori Teachers' Conference Misc	6,987	8,000	6,987
7,420	7,420	Whaea & Kaumatua	4,965	4,500	4,965
11,801	11,801	Maori Contributions to Key W/P	6,350	10,000	6,350
8,045	8,045	Kapa Haka	5,641	5,000	5,641
-	-	Conference Calls	69	800	69
34,282	34,282	Nga Manu Korero	33,407	34,500	33,407
202,983	202,983	Staff Costs	204,776	202,200	204,776
6,359	6,359	General Expenses	1,666	5,000	1,666
<b>375,862</b>	<b>375,862</b>	<b>TOTAL MAORI ACTIVITIES</b>	<b>384,446</b>	<b>405,000</b>	<b>384,446</b>
<b>MEMBERSHIP</b>					
191,713	191,713	General Expenses	191,238	181,500	191,237
175,517	175,517	Members Legal Representation	76,560	100,000	76,560
2,685,422	2,685,422	Staff Costs	2,662,858	2,674,000	2,662,858
220,726	220,726	Training Activities	248,518	229,845	248,372
162,586	162,586	Auckland Field Office	147,374	149,500	147,374
80,458	80,458	Christchurch Field Office	72,821	77,200	72,821
31,531	31,531	Dunedin Field Office	27,182	31,800	27,182
81,905	81,905	Hamilton Field Office	95,149	85,300	79,925
145,423	145,423	Palmerston North Field Office	116,319	126,000	116,319
<b>3,775,281</b>	<b>3,775,281</b>	<b>TOTAL MEMBERSHIP EXPENSES</b>	<b>3,638,019</b>	<b>3,655,145</b>	<b>3,622,648</b>

**New Zealand Post Primary Teachers' Association (Inc)**  
**Notes to the Financial Statements**

For the year ended 31 March 2016

**14 Detailed Schedule of Expenses (continued)**

<b>National Office 2015</b>	<b>NZPPTA 2015</b>		<b>National Office 2016</b>	<b>Budget 2016</b>	<b>NZPPTA 2016</b>
<b>POLICY AND ADVOCACY</b>					
352,695	352,695	Association Activities	225,677	435,600	216,661
82,325	82,325	Collective Agreement	214,876	170,000	214,876
98,833	98,833	General Expenses	75,896	55,100	75,895
151,574	151,574	Information Services	130,039	156,000	130,039
43,391	43,391	Principals' Council	42,134	35,500	42,134
1,440,961	1,440,961	Staff Costs	1,470,676	1,419,000	1,470,676
<b>2,169,779</b>	<b>2,169,779</b>	<b>TOTAL POLICY &amp; ADVOCACY</b>	<b>2,159,298</b>	<b>2,271,200</b>	<b>2,150,281</b>
<b>OTHER</b>					
186,651	187,276	Depreciation Expense	146,828	190,000	147,381
-	-	Mahi Tika	-	5,000	-
-	-	Surplus Staffing Reserve	-	30,000	-
<b>186,651</b>	<b>187,276</b>		<b>146,828</b>	<b>225,000</b>	<b>146,826</b>
<b>9,751,554</b>	<b>9,692,298</b>	<b>TOTAL EXPENDITURE</b>	<b>9,241,836</b>	<b>9,524,445</b>	<b>9,223,036</b>

**14 Operating Lease Expenses**

The following operating lease expenses are included in the in the expenditure categories above:

1,879	1,879	Equipment Leases	1,794	2,500	1,794
131,690	131,690	Office Rental	131,982	155,500	131,982
127,997	127,997	Motor Vehicle Leases	127,074	127,000	127,074
<b>261,566</b>	<b>261,566</b>		<b>260,850</b>	<b>285,000</b>	<b>260,850</b>

**15 Benefit Payments to Staff**

During the year \$514,568 was paid in contribution to superannuation schemes for staff. (2015 \$578,262)

**16 Subsequent Events**

There were no events subsequent to balance date which materially affected the integrity of these financial statements.



**INDEPENDENT AUDITOR'S REPORT**  
**To the members of New Zealand Post Primary Teachers' Association (Inc.)**

**Report on the Financial Statements**

We have audited the financial statements of New Zealand Post Primary Teachers' Association (Inc.) on pages 1 to 12, which comprise the statement of financial position as at 31 March 2016, the statement of comprehensive, the statement of changes in equity, and statement of cash flows for the year then ended, and a summary of significant accounting policies and other explanatory information.

This report is made solely to the members, as a body, in accordance with the Incorporated Societies Act and the Constitution of New Zealand Post Primary Teachers Association Inc. Our audit has been undertaken so that we might state to the members those matters we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the members, as a body, for our audit work, for this report, or for the opinions we have formed.

**Executive Committee's Responsibility for the Financial Statements**

The Executive Committee is responsible for the preparation and fair presentation of these financial statements in accordance with Public Benefit Entity International Public Sector Accounting Standards (Not for Profit) Reduced Disclosure Regime ("PBE IPSAS (NFP) RDR") and for such internal control as the Executive Committee determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

**Auditor's Responsibility**

Our responsibility is to express an opinion on these financial statements based on our audit. We conducted our audit in accordance with International Standards on Auditing (New Zealand). Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by Executive Committee, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

In addition to audit services, our firm provides other services in the areas of taxation advice. We have no other relationship with or interests in the New Zealand Post Primary Teachers' Association (Inc.).

**Opinion**

In our opinion, the financial statements present fairly, in all material respects, the financial position of New Zealand Post Primary Teachers' Association (Inc.) as at 31 March 2016, and its financial performance and its cash flows for the year then ended in accordance with PBE IPSAS (NFP) RDR.



**BDO Wellington**  
**6 September 2016**  
**Wellington**  
**New Zealand**