

# PPTA TE WEHENGARUA ANNUAL REPORT 2016 – 2017

I TĒTAHI AHIAHI, E WHAKARERI ANA A MĀUI ME ŌNA TUĀKANA I TĒTAHI HĀNGI, HAI HĀKARI MĀ RĀTAU. KĀTAHI ANŌ KA MUTU AKE TE WHAKAWERA



**Published by:**

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

ISSN 2382-2058 (print)  
ISSN 2382-2066 (online - [ppta.org.nz](http://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.



E ngā kaiako o Aotearoa: Ngā mihi nui hoki koutou mana.

It is a real honour to be able to champion secondary teachers and public education as PPTA president. While I've only been in the role for seven months as I write this, I go to work every day inspired that I am able to work on behalf of our world leading and committed secondary teaching profession.

No doubt like many of you, I feel like the year has been moving in fast forward, with significant changes and increasing expectations leading to fewer and fewer opportunities to take stock, breathe out and practise a little mindfulness. Certainly across the 50 or so schools I've been lucky to visit this year this has been a pretty consistent message. Teachers and principals in all of those schools and kura have said the same thing: something needs to change.

The most obvious issues facing us at the moment are workload and teacher supply. Because of our consistent efforts there has been grudging acknowledgment from the government of these challenges and, following a working party in 2016, there is a joint plan to start addressing them. While this is a start, we know that the solutions to these two problems are extensive, expensive and will require something more strategic than the superficial resolutions that the three-year political cycle normally provides.

It is highly likely that real solutions will have to be gained through our industrial bargaining round in 2018.

On a more positive note the 2016/2017 year showed PPTA a new direction for achieving success as a workforce. By joining together with other education sector unions and the wider community we were able to convince the government that bulk funding of teacher salaries was not wanted in Aotearoa. Thank you again for participating in the largest union meetings in recent memory and for all the other ways you supported the Better Funding campaign.

Another example of the power of ranging wider than just the 18,000 secondary school teachers in PPTA can be seen in the progress we have made this year on an alternative means of resolving the inequity of employment conditions for our part time workforce. Your support for a pay and equity case on behalf of these teachers has proven to be timely, allowing our claim to sit alongside other workers, such as aged care workers and support staff, in the public view. We keenly anticipate a similar success to that achieved by other unions.

2017 also saw the departure of education minister Hekia Parata. Before she left, NZEI president Lynda Stuart, NZPF president Whetu Cormack and I travelled to Edinburgh with the minister where

we were able to convince her to commit New Zealand to a focus on teacher wellbeing which will be reported on at the next international forum in Lisbon, Portugal in early 2018.

We are determined to hold the minister of the day to account on this commitment.

With the minister's departure there has also been a slow down of the review of the funding system. Going more slowly and co-constructing with the sector and wider community is an improvement on the way things used to be done - 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. Almost always this way of operating has translated into pressuring schools and teachers to do more with less.

While things may have changed on 23 September, the opportunity to lead the debate and work closely to ensure that further changes to education policy in Aotearoa meet the needs of the profession and our tamariki is something to be seized upon. PPTA's role remains the same, no matter what stripe the government.

The other issue that has bubbled to the surface this year has been the growing role of the Education Council. PPTA members were pleased with the inclusion of central funding of their fees in the current collective (2015-2018). However, consultation about substantial increases to these (and the spectre of teachers having to pay these themselves) was met with resounding displeasure. Naturally, this took some of the gloss off the council's release of new standards for teaching last month, despite their clear efforts to be consultative. As long as the council's governing legislation means teachers have no say in its configuration and they have no direct accountability to teachers, teachers will continue to have problems with this body.

The decision to transfer responsibility for professional learning and development (PLD) to the council has not made matters any better. This important investment in professional effectiveness looks confused and complicated to access, with the new model creating a low cost, low quality workforce of PLD providers. Whether or not yet another new model of PLD delivery for teachers eventuates in the coming months remains to be seen.

With a new Secretary for Education, Iona Holsted, a new Minister of Education, Nikki Kaye and the constant churn of issues and stories that an election year brings, it has been great to have positive leadership from our hardworking PPTA activists across the motu, a supportive and incredible team at national office in Wellington and the unwavering commitment of teachers who are so dedicated to teenagers and public education.

Kia kaha.

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FOREWORD TO THE 2016-2017 ANNUAL REPORT: PPTA GENERAL SECRETARY,  
MICHAEL STEVENSON



This has been another significant year for PPTA, with the defeat of bulk funding as the main prize. In the 1990s it took members nearly a decade to see off this challenge. So, along with our NZEI colleagues, we should feel very pleased with the result of the 2016 battle that saw victory achieved in five short months.

Now our attention turns to the 2018 bargaining round. With the top of the basic trained scale at \$78,000, and mounting teacher supply and

workload pressures, members are unlikely to be impressed with another round of the low percentage increases that have been commonplace in the post global financial crisis era.

The past year has also seen the development of a new Association Strategic Plan for 2017 – 2021. Over 700 members and staff answered a series of questions which were analysed before producing a long-term plan with four pillars: advocacy, education, policy and voice. The new strategic plan, when read alongside our constitution and Te Rautaki, provides clear direction for both members and staff around what the PPTA does.

The June 2017 filing of our equal pay case in support of part-time members was long overdue considering the issue of equitable non-contact time was first raised with the Ministry of Education in the early 2000s. I salute the four brave member plaintiffs who will be the face of this case in the court room and in public on behalf of all disadvantaged colleagues.

Membership has remained steady, 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 freeloaders. 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 solid surplus last year, the PPTA accounts are in good shape again, which is particularly pleasing given funds had to be allocated outside of the original budget to fight bulk funding. It is reassuring that we can maintain a surplus while organising around a significant attack on public education.

There have been further staffing changes in PPTA reflecting the same demographic pattern that exists in the secondary service, as more of our experienced and long-serving staff move into retirement. Robust recruitment procedures continue to be used, ensuring we continue to deliver the service, education and organising opportunities members expect.

During the year we have had to farewell our dear friend Colin Moore. Colin was the rock of the PPTA field service for nearly 30 years. Colin passed away unexpectedly in December 2016 and his loss was felt right through Te Wehengarua. There was a large PPTA contingent at his tangi in Wellington. Colin managed the PPTA field service through many challenging times, encompassing the introduction of Tomorrow's Schools in the late 1980s, the 1990s when the State Sector Act and bulk funding came into being and unions were tied in knots by the Employment Contracts Act. Farewell Colin.

This section of the New Zealand Post Primary Teachers' Association/Te Wehengarua (PPTA) annual report for the 2016-2017 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 with a maximum term of four years based in Wellington, for which the incumbent can take 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 2016-2017  
YEAR \*\* LEFT JANUARY 2017 OR EARLIER / \* FROM FEBRUARY 2017

PPTA NATIONAL EXECUTIVE

Chris Abercrombie, Rodger Barlow, Miriama Barton\*, Jack Boyle, Graeme Bridge, Chris Carr\*, Glenn Cassidy, Ellen Curnow, Natalie Faitala, Jill Gray\*\*, Karen Gibbs\*, Kevin Greig, Jacinta Grice, Jonathan Handley-Packham, Vince Hapi, Kylee Houppapa\*, Joe Hunter, Henare Hutana, Gazala Maihi, Hazel McIntosh\*\*, Lawrence Mikkelsen, Vinnie Monga, Austen Pageau, Simon Reid, Angela Roberts, Terry Robson, Graham Smith, Wiki Te Tau\*\*, Rob Torr, Melanie Webber, Trevor Wilson\*\*, Miles Winter



TE HUARAHI MĀORI MOTUHAKE

Miriama Barton, Vincent Hapi, Henare Hutana, Gazala Maihi, Charis Rata\*\*, Roxie Aloj\*\*, Wiki Te Tau, Te Wharekotua Turuwhenua, Kui Morrell, Tihi Puanaki, Sonny Tawake, Hana Wijohn, Tamara Hapi\*\*, Cecelia Pakinga, Maruia Jensen, Patty Robinson\*, Brandon Amoamo\*, Johnny Waititi\*

TE RŌPŪ MATUA

Jack Boyle, Joe Hunter, Henare Hutana, Gazala Maihi, Vinnie Monga, Cecelia Pakinga\*, Sonny Tawake\*, Te Wharekotua Turuwhenua

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## EXECUTIVE COMMITTEES

### MANAGEMENT COMMITTEE

Jack Boyle, Jill Gray\*\*, Jonathan Handley-Packham, Joe Hunter, Henare Hutana, Austen Pageau\*, Angela Roberts, Wiki Te Tau

### CURRICULUM ADVISORY COMMITTEE

Chris Abercrombie, Graeme Bridge, Jill Gray\*\*, Jonathan Handley-Packham\*\*, Kylee Houpapa\*, Kui Morrell\*\*, Graham Smith\*\*, Johnny Waititi\*, Melanie Webber

### PROFESSIONAL ISSUES ADVISORY COMMITTEE

Miriama Barton\*\*, Jack Boyle\*\*, Glenn Cassidy, Karen Gibbs\*, Kevin Greig\*\*, Joe Hunter, Simon Reid, Angela Roberts\*, Melanie Webber\*

### POLITICAL STRATEGY COMMITTEE

Chris Abercrombie, Roxie Aloii\*\*, Glenn Cassidy, Karen Gibbs\*, Kevin Greig, Kylee Houpapa\*, Lawrence Mikkelsen, Austen Pageau, Simon Reid, Johnny Waititi\*

### CONDITIONS STRATEGY COMMITTEE

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

### KOMITI PASIFIKA

Alvin Chand, Natalie Faitala, Maria Lemalie, Knisha Ruland, Sinapi Taeao, Teokotai Tarai

### 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, Phil McCreery, James Morris, John Paitai, Simon Reid, John Russell, Lynlee Smith, Allan Vester, Stephen Walters\*

### SENIOR POSITIONS ADVISORY COMMITTEE

Jay Barr, Kevin Byrne, Laurence Caltaux\*, Cristina Casey-Schoner, Kevin Dean, Philippa Ferguson, Jill Gray\*\*, Stephanie Harford\*\*, Peter Mathias, Julie Netzler\*\*, Maria Neville-Foster\*, Penny Prestidge, Stephen Read, Elizabeth Ross\*, Timothy Tucker, Johnny Waititi\*, Melanie Webber\*, Joel Wilton

### ICT ADVISORY COMMITTEE

Carolyn Alexander-Bennett, Glenn Cassidy\*\*, Rachel Chisnell\*, Kate Christensen\*, Karen Corbin\*\*, Manu Corcoran, John Creighton, Ellen Curnow\*\*, Chris Dillon\*, Joanne Ellis-Smith\*, Pauline Faiers\*\*, Tish Glasson, Alex Le Long, Gerard Macmanus, Lawrence Mikkelsen\*, Samantha Mortimer, Salman Qureshi\*\*, Jody Reynolds, Andrew Ricciardi\*, Sonny Tawake\*\*, Johnny Waititi\*, Jason White, Miles Winter

## AREA SCHOOL ADVISORY COMMITTEE

Bruce Anink, Graeme Bridge, Alec Campbell, Alan Carson, Justin Downes, John Lee\*\*, Isabel Rangiwananga\*\*

## ESTABLISHING TEACHERS' COMMITTEE

Nathan Bergin, Chris Carr, Vincent Hapi\*\*, Maruia Jensen\*, Alex Le Long, Austen Pageau, Katie Scott

## RAINBOW TASKFORCE FOR SAFE SCHOOLS

Jerome Cargill, Chris Carr\*, Shawn Cooper, Angela King, Ben Mills\*, Vinnie Monga, Cecilia Pakinga, Paul Stevens\*, Michael Tarry\*\*

## WOMEN'S NETWORK

Melly Allom, Irene Anderson\*\*, Jennifer Ashby\*, Jacquie Bowen\*\*, Elizabeth Brown, Morgan Bunny\*\*, Fiona Churcher, Fiona Cooper\*, Juliette Emery\*, Jane Goodacre\*\*, Amanda Greville\*, Tamara Hapi\*\*, Anna Heinz, Lisa Holden, Ann Hoover\*\*, Kylee Houppapa\*\*, Joe Hunter, Louise Irwin\*\*, Gurpreet Kaur, Angela King\*\*, Aletta Lamprecht, Bernie Lee, Angela McMinn\*\*, Beverley McDonnell, Vanessa Pringle\*, Verity Rowsell-Starkey\*\*, Ray Ryan, Freddie Simpson\*, Jacqueline Smith\*, Faith Tautuhi\*\*, Natalie Tregidga\*\*, Esther van Dyke, Jane Walker\*\*, Emma Wallis\*\*, Barbara Williams, Yomi Williams\*

## SURPLUS STAFFING NOMINEES

Auckland: Rodger Barlow, Ian Duffield\*\*, Kendra Greenwood, 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

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

## MIDDLE LEADERSHIP TASKFORCE

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

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## PPTA REGIONAL OFFICERS

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

### REGIONAL CHAIRPERSONS

Martin Kane, Michael Cabral-Tarry, Rae Brown\*\*, Brigid Raymond, Isabel Rangiwananga, Janette Snowden, Conan Doyle, Ewan Grant-Mackie, Julian Lumbreras\*\*, Radne Ardern\*, Desiree Mulligan, Alan Carson, Grant Collie, Ngaire Searle, Anna Heinz\*\*, Jacquie Bowen\*, Micky Nogher, Jenny Joynt\*\*, Kendra Greenwood\*, Graham Sharp, Pauline McNeill, Terry McNamara\*\*, Penny Dunckley\*, Penny Fletcher\*, Erin MacDonald, Jo Belgrave, Morgan Bunny\*\*, Evan Jones\*, Trudy Reeves\*\*, Shane Wilson\*, Vanessa Pringle\*\*, Nathan Bergin\*, Tania Rae

### REGIONAL SECRETARIES

Sarah Robinson\*\*, Rosie Adams\*, Kathryn Jenkin, Victoria Macann\*\*, Jason Liddall\*, Jo Fissenden, Jeremy Ball, Tom Leonard, Jason Devery, Peter McNeil\*\*, Jennifer Baylis\*, Andrea Sims, Andrea Graham\*\*, Emma Wallis\*, Rebecca Hopper, Dan Searle, Hess Williams\*\*, Robyn Weir, Kendra Greenwood\*\*, Russell Stirling\*, Diana Henderson\*\*, Adrian Bosman\*, Dave Patchett, Janelle Eason, Trevor Hook, Hein Laaper\*\*, Kathleen Christian\*, Nigel Bailey\*\*, Evan Jones\*, Ray Curnow, Kim Whyte

### REGIONAL TREASURER

Stephen Ross, Savitri Nadan, Niall Pearce, Sharon Gudsell\*\*, Marie Blackley\*, Tony Tinworth\*\*, Te Kapua Hohepa-Watene\*, Stuart King, Jamie Ashman, Jan Collier, Chris Hodge\*\*, Lisa Hargreaves\*, Divendar Nath, Vijeshwar Prasad, Barry Stevenson\*\*, Radha McKendry\*, Robyn Bright, Sue Young\*\*, Hazel McIntosh\*, Eileen Parsons, Veronica Gell\*\*, Sarah Morgan\*, Pauline McNeill\*\*, Tonia Calverley\*, Terry McNamara, Jane Gilbert\*\*, Angela Roberts\*, Pushpa Reddy, Mike van Woerkom, Vernon Tile, Louise Towers\*\*, Juliet Buenaventura\*, Phil Adams

### TE REO-A-ROHE

Marie Donaldson\*, Sharon Fernée, Tina Peters, Rauhina Tipuna\*, Elaina Phillips\*\*, Mike Murray, Hemi Ferris-Bretherton, Powhiri Rika-Heke, Trish Tangaroa, Mere Manning, Barbara Thomason, Jan Worrall\*\*, Jane du Feu, Maria Jackman\*\*, Te Aomihia Taua-Glassie\*, Waimarie Paikea (Morgan)\*\*, Thomaseena Paul\*, Te Puawaitanga Silich, Cherie Ford, Rihari Brown, Tai Huata\*\*, Faith Tautuhi\*, Jason Va'a\*, Christine Weepu, Kapuhua Waaka

### REGIONAL ESTABLISHING TEACHER REPRESENTATIVES

Susie Matheson\*\*, Paul Stevens\*\*, Sonya Clark\*, Alex Le Long\*\*, Nathan Thompson\*\*, Tiffany Allan\*\*, Katie Scott, Pratik Jethwa, Matt Whibley, Jason Megchelse, Chris Carr\*\*, Kerry Morgan\*\*, Phil Chiet\*, Katrina Fort\*\*, Greg Allum\*, Grady Trail\*\*, Josh Clark\*, Marsha Finlay\*\*, Brian Dunckley\*, Arran Wilkinson\*\*, Kussi Hurtado-Stuart\*, Pip Paulin, Kijiana Pene\*, Sam Speedy, Stacey Morgan, Ngarangi Te Riini, Michael Waller\*

### REGIONAL WOMEN'S COORDINATORS

Lisa Holden, Kylee Houpapa\*\*, Freddie Simpson\*, Melly Allom\*\*, Bernie Lee, Aletta Lamprecht, Gurpreet Kaur, Elizabeth Brown, Beverley McDonnell, Ann Hoover\*\*, Juliette Emery\*, Jane

Goodacre\*\*, Amanda Greville\*, Emma Walli\*\*, Angela McMinn\*\*, Amanda Ellwood, Jacque Bowen\*\*, Anna Heinz\*, Fiona Churcher, Verity Rowsell-Starkey\*\*, Fiona Cooper\*, Esther Van Dyke, Natalie Tregidga\*\*, Jennifer Ashby\*, Barbara Williams, Jane Walker\*\*, Yomi Williams\*, Faith Tautuhi\*\*, Jacqueline Smith\*, Morgan Bunny\*\*, Angela King\*\*, Irene Anderson\*\*, Vanessa Pringle\*, Ray Ryan

#### REGIONAL PASIFIKA COORDINATORS

Joyce Shankar-Kay\*, Parwati Reddy\*, Jess Earnshaw\*\*, Linda Sime\*\*, Divendar Nath, Vijeshwar Prasad, Mark Mason\*, Fion 'Ofamo'oni\*, Kijiana Pene\*, Devendra Naidu

#### REGIONAL MEN'S REPRESENTATIVES

Rodger Barlow\*, Tim McCaffery\*, Brian Dunckley\*



2017 is the off year in a three year industrial cycle, with the STCA having been settled in 2015 and not up for renegotiation until next year, and the ASTCA, SPCA, ASPCA and ACECA all having been settled last year and not due for renegotiation until 2019.

However, 2017 is the year for strategising for the teacher collective agreements. The industrial strategy paper: *'Once more unto the breach, dear friends, once more'* is being presented and will be discussed at the 2017 PPTA conference. This strategy will be the basis for our claims process for the STCA in 2018, as well as the ASTCA in 2019.

## SECONDARY TEACHERS' COLLECTIVE AGREEMENT (STCA)

While there are always ongoing issues regarding the implementation and interpretation of collective agreement provisions, the main industrial activity arising from the 2015 settlement of the STCA were the two working groups which were agreed in the terms of settlement. These were the Supply Working Group and the Workload Working Group, made up of representatives from PPTA, the Ministry of Education and the School Trustees' Association (NZSTA). The reports from both of these working groups are available on the PPTA website and there is a section on the implementation of the recommendations from the working groups in this report.

## AREA SCHOOL TEACHERS' COLLECTIVE AGREEMENT (ASTCA)

The ASTCA is bargained jointly with the New Zealand Educational Institute (NZEI). This has usually resulted in our settling the ASTCA after settlements of the STCA and the PTCA (Primary Teachers' Collective Agreement). This did not unduly disadvantage area school members in the past, due to the Ministry agreeing to align expiry dates and provide backpay for area school members. However, the last three bargaining rounds have left area school members further and further behind, due to the National-led government refusing to either align the dates or provide significant backpay. The 2015/16 bargaining round left our area school members significantly disadvantaged due to NZEI's delay in settling the primary teachers' agreement. While the ASTCA settlement was finally achieved along the same lines as the STCA, members did not receive their first increase until six months after their secondary colleagues.

Accordingly we held paid union meetings (PUMs) with area school teacher members early this year to discuss the issue and test their strength of feeling for the union to claim coverage for them under the STCA in the next round. While the majority of those who responded to the survey we held following the PUMs were in favour of moving to STCA coverage, the executive decided there was not a sufficient number of members calling for it at this time. Accordingly the union will make every effort to ensure future settlements do not continue to disadvantage our area school members and we will revisit the situation after the next bargaining round is concluded.

## SECONDARY PRINCIPALS' COLLECTIVE AGREEMENT (SPCA)

The SPCA will not expire until May 2019 when it will be up for bargaining again. Changes to the funding system for schools will mean we will need to work out a replacement to the decile element (one of five parts) of salary for principals, with the change from decile funding.

During the term of this agreement a variation to the SPCA was negotiated and ratified by members, and has taken effect from 25 August this year. This allows for an alternative

arrangement for Communities of Learning (CoL) to appoint two other CoL principals to undertake some of the responsibilities of the leadership role for a small share of the leadership role allowance, without the need to seek the agreement of the Secretary for Education. The SPCA still allows for a range of alternative appointments to this role, e.g. the appointment of someone other than a principal, or for a different job sharing arrangement, with the concurrence of the secretary.

#### AREA SCHOOL PRINCIPALS' COLLECTIVE AGREEMENT (ASPCA)

There have been no variations, working groups or other issues arising from the settlement of the ASPCA in June last year. The ASPCA will expire in June 2019 and will similarly require an adjustment to the salary components of area school principals with the move away from decile funding.

#### ADULT COMMUNITY EDUCATION COLLECTIVE AGREEMENT (ACECA)

Similarly there has been no change to the provisions for community education employees covered by the ACECA since it was settled in June last year. This agreement was also settled for three years and will be up for renegotiation in June 2019.

This is our smallest collective agreement. The number of schools offering community education has dwindled from 212 in 2009 to around 12 as a result of the removal of funding for night classes over seven years ago. However, we are pleased to have retained a collective agreement for the small group of members still able to offer valuable adult education in their communities.

#### INVESTING IN EDUCATION SUCCESS (IES)

The roll out of IES has been disappointing. The engagement with teaching staff and parent communities is often lacking when CoL are established. Political interference, pressure to adopt a narrow range of 'approved' achievement challenges, inflexibility around leadership arrangements and membership have characterised the development of CoL to date. Increasingly the government has pushed more and more expectations onto the still-developing CoL system. On the other hand, where CoL are working well there is a high degree of enthusiasm amongst those involved, and members broadly continue to support the intentions of the initiative. PPTA has coordinated with other sector organisations to bring the initiative back on to its intended pathway. Several hundred of our members have taken on CoL roles.

#### INDUSTRIAL ISSUES

As well as the many personal cases taken by our field staff on behalf of members, the major industrial issues the union continues to grapple with include: recruitment and retention (supply) of teachers, workload, coverage, funding of schools, issues with the implementation of CoL, health and safety, workplace bullying, charter schools, illegal use of fixed term agreements, and the equal pay case we are taking for equitable non-contact time for part time teachers.

#### LEGAL CASE: PRO-RATA NON-CONTACT TIME FOR PART-TIME SECONDARY TEACHERS

PPTA has been advocating for the last 15 years for equitable non-contact time for our part-time members. While the STCA and the ASTCA have some very limited non-contact time for part-time teachers in 0.72 positions and above, this time is not prorated and not equitable. In the six rounds of collective bargaining beginning in 2002 and in every bargaining round since, we have claimed

for equitable non-contact time for all teachers, and every time the ministry has refused. We have also participated in two working groups and the four-year tripartite Pay Equity Review of schools from 2003 to 2008 without any effect at all.

Our view is that not providing this paid non-contact time is unlawful discrimination, an equal pay issue and in breach of the good employer provisions in STCA and the State Sector Act 1988. Part-time secondary teachers are predominantly women, which is why it is a gender equity issue.

PPTA has now filed a case with the Employment Relations Authority (the Authority) against the Ministry of Education and the NZ School Trustees' Association on behalf of employing schools. Four brave women members are taking this case on behalf of their fellow part-time members. As part of the process we took part in an entirely unsuccessful mediation so are now awaiting a date for the case to go ahead for a hearing in the Authority.

The National-led government has just introduced the Employment (Pay Equity and Equal Pay) Bill, which will change the law in a way that will negatively impact on the ability of women and unions to take pay equity claims in future (although it will not affect ours). We will be writing submissions to the select committee on this bill and encouraging members to become involved in equal pay activity in their regions. If the government changes at the election the legislation is liable to change completely, because the Labour and Green parties have said that they do not support it.

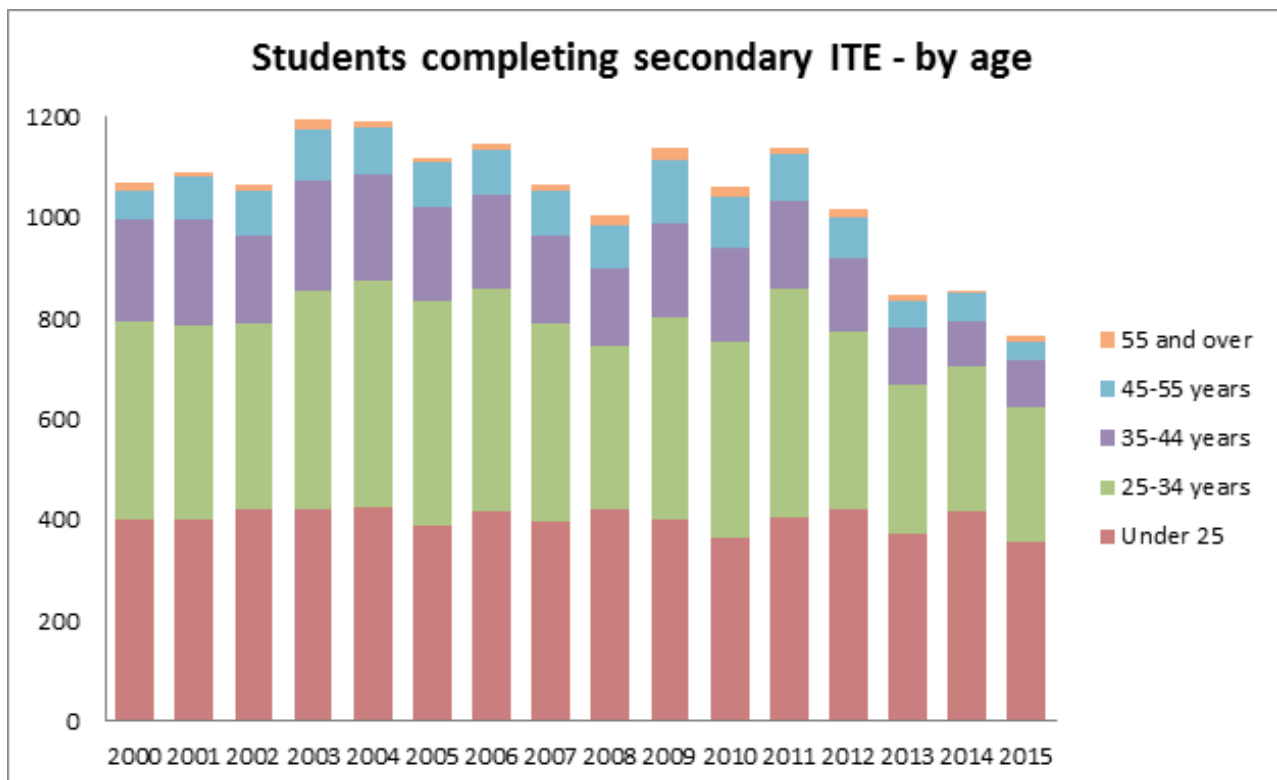


*PPTA President Jack Boyle with the claimants in our legal case*



## SUPPLY TEACHER SHORTAGES

Secondary teacher shortages are primarily the result of low relative wages and excessive workloads. The fall in the number of secondary teacher trainees, the inability to recruit new teachers, particularly second career teachers, and difficulties in filling middle leadership positions have become intense and are unlikely to abate without significant salary and workload improvements or an economic collapse similar to the global economic crisis. The problems are most intense in areas like Auckland where housing costs are high and in high-demand subjects like science and mathematics, but are spread widely in both geographic and subject terms. Poor employment practices exacerbate the supply problem. Urgency is added to addressing the supply crisis by the combination of high numbers of teachers approaching retirement, a growing economy and secondary roll growth for most of the next decade.



Source for the data - Education Counts, initial teacher education statistics.

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## SECONDARY SCHOOL STAFFING

### SUPPLY AND WORKLOAD WORKING GROUPS

PPTA and the Ministry of Education, along with relevant other organisations, undertook two major working parties in 2016, one on secondary teacher supply and one on secondary teacher workload. Both working parties have reported. The government-funded agencies that were represented on the groups would not agree to recommendations that represented additional funding or changes to existing government policy but a number of joint recommendations were included in both reports. Currently a joint work programme is underway to work on those joint recommendations.

### 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 2016, 167 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 2016 the total staffing reduction was 165.8 fulltime equivalent positions and 174 management units. This represented a vast drop from 2015 figures.

### SCHOOL FUNDING

Since Annual Conference 2016 the main event in regards to the government’s review of school funding was the back-down on the ‘global budget’. This was officially announced in November 2016, after an unprecedented joint campaign from PPTA and NZEI, and a near unanimous position against it from the sector.

Following this defeat (or victory, from our perspective) the funding review went quiet. Technical reference groups were established, which included PPTA, to give advice on elements of the review, with a timeline to report during 2017. These included funding for disadvantage (the decile replacements), base funding amounts, and top-up funding for small and isolated schools. Other than the first of these there has been little evidence of action.

One significant change in rhetoric regarding the review, the message that it would all be happening within ‘existing baselines’, has been dropped and the latest cabinet papers talk about the review possibly identifying a need for more funding. The new minister has strengthened the impression that the government will have to put extra resourcing in to get these changes over the line, with the statement that no schools would lose funding under the new disadvantage mechanism.

The replacement for decile, which was announced in late July, will use 15 or more data sets held by government instead of the five factors from the census to identify students at risk of underachieving and generate the 'equity top up' for schools. PPTA continues to advocate that this equity component should include extra staffing, should have a concentration factor and should recognise tiers of need, as decided by Annual Conference 2016.



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## POLITICAL ISSUES

### CHARTER SCHOOLS

Two new charter schools were announced in 2017 to open next year, which will take the total to 12, with around 1300 students enrolled. These will be in Rotorua and Taupō, one run by a local iwi organisation and the other by the Blue Light trust, which is associated with the police force. The other 10 are in Whangarei, Auckland, Hamilton and Hawkes Bay. As we go to print, another four have been announced to open in 2019.

Recent policy changes mean tertiary institutions can now run charter schools, and the remit has expanded from only being for 'priority learners' to also allow STEM-focused schools.

Figures from this year show that some of the schools continue to get very high NCEA results, but generally they have very narrow curricula, tiny class sizes and attract motivated students. A number of the schools are well below the student rolls they are funded for and some are failing to meet most of their performance standards. NCEA leaver data shows that charter schools are doing worse than public schools.

PPTA remains concerned that the evaluation is not looking at the effectiveness for students enrolled at charter schools or the impact on surrounding schools. Without research into these, claims that they are being 'piloted' are nonsense.

Amusingly, this year dissension in the ranks of charter school promoters bubbled over, with Alywn Poole and David Seymour taking pot-shots at each other in the media over Seymour's attempt to make sure complaints from Poole weren't available under the Official Information Act. At the same time, Seymour claimed that Parata wasn't a supporter of charters, and if he hadn't forced her hand there would have been none opened since the first round.

### LEGISLATION AND SUBMISSIONS

PPTA has written and given oral submissions to select committee, the Law Commission and government departments on many bills over the last financial year, including:

- Education (Update) Amendment Bill
- Incorporated Societies (draft Bill)
- Employment Standards Legislation Bill
- Education (Amendment) Bill No. 2
- Domestic Violence Victims' Protection Bill
- Employment (Pay Equity and Equal Pay) (draft Bill)

### EDUCATION (UPDATE) AMENDMENT BILL - COMMUNITIES OF ONLINE LEARNING (COOL)

On 15 May 2017 the Education (Update) Amendment Bill, which mandated a new regulatory framework to enable any school, tertiary education provider or body corporate to be accredited as a Community of Online Learning, became law. The COOL provisions will not come into full effect until 31 December 2019.

The Education (Update) Amendment Bill was introduced to parliament on 22 August 2016. The introduction of a new class of 'school' in the bill (a Community of Online Learning, or COOL) was a surprising and alarming addition. COOL would enable: the transfer of public funds to private profits; bulk-funding; de-professionalisation of the teaching profession; de-unionisation of the teaching profession; corporatisation of schools and the return of depersonalised, factory style rote learning.

We made our concerns widely known, commenting publicly as well as in private meetings with ministry officials, and with members of parliament and their staff. Press statements were picked up by the media and many independent commentators came out against COOL.



Professor Gary Miron from Western Michigan University came to New Zealand on the invitation of PPTA to talk about the US experience of online schools. Gary had very productive and credible meetings with a range of politicians and policy makers, and was well-received. He had a very busy week here which included:

- four public meetings in Auckland, Wellington and Christchurch;
- a key note address at the New Zealand Association of Research in Education Conference;
- meetings with government MPs including the Minister of Education and the Chair of the Education and Science Select Committee;
- meetings with officials from the Ministry of Education and Treasury;
- meetings with opposition MPs from the Education and Science Select Committee;
- talking to around five media outlets.

PPTA members wrote submissions against the COOL provisions and made oral submissions before the Education and Science Select Committee.

The bill was reported back to the House with no significant changes despite the efforts of the sector. The government had the numbers to pass the bill. The Ministry of Education has undertaken to consult with the sector during the development of the regulations.

While the COOL proposal opened up a useful public discussion about online learning, it is unfortunate that the initial process divorced the purpose of learning from the delivery mode.

[PPTA position on online schools](http://ppta.org.nz/dmsdocument/481) (<http://ppta.org.nz/dmsdocument/481>)

## NCEA

The workload associated with NCEA continues to be a concern for PPTA. The report of the Workload Advisory Group (published in April 2016) highlighted the words “If there is a single bale which is breaking the back of secondary teachers it is NCEA”. These concerns were a significant part of discussions in the Workload Working Group during the second half of 2016, and a number of recommendations from that group are being pursued through the implementation processes. These include recommendations about reducing assessment, especially in Year 11, improving resourcing, and stopping “over-engineering” of quality assurance processes in schools. While progress is slow, there is a shared commitment to these recommendations across all the government agencies and PPTA.

NZQA’s process of moving to digital assessment for external standards, under the general heading of “Future State”, has become more realistic and measured in the last year, with a more careful implementation process and a willingness to abandon pilots, even in the late stages, where testing shows that proceeding would not be safe, as happened with French in 2016. The messages about target dates are also less threatening, so that although 2020 is being signalled as being the year when they aim to have all examinations available online “where appropriate”, it is clear that they do not anticipate that all students will be doing all their assessments online by then.

Progress towards digital moderation for both external and internal moderation purposes has also been slower than expected because of glitches experienced in the implementation phases. At the time of writing, the external moderation tool is approaching completion, but the internal moderation tool is yet to see the light of day. NZQA has hopes that the internal moderation tool, when it is up and running, will help with teacher workload; PPTA members are yet to be convinced of that.

The ministry has expressed concern that the literacy and numeracy requirements for NCEA may not be sufficient evidence of students having the necessary skills, and it is likely that this will be one of the issues they bring to the review of NCEA in 2018. This issue will be highlighted in the 2017 Annual Conference paper *NCEA Review 2018: An opportunity for change*.

University Entrance requirements have been the subject of discussion in the last year, but no significant changes have ensued. A significant achievement is that a process has finally been agreed for the Level 3 standards derived from Te Marautanga o Aotearoa to achieve credit for University Entrance. Finding a way to do this was quite complex because these standards are written for learning areas rather than for individual subjects, and for English medium the universities have been resistant to recognising achievement across a learning area beyond what is already possible in Maths, Science and Technology. It is PPTA’s view that this needs to change to allow for innovative Level 3 courses across the curriculum.

## VOCATIONAL PATHWAYS

Vocational pathways first became available for awards on students’ Level 2 NCEA results in 2014. However, the number of students achieving a pathway award has barely changed since that time, from 15.6 percent to 17.4 percent of students achieving one or more awards. Without the introduction of the creative industries pathway, the position would be even more dire, because that pathway forms the great majority of the awards achieved (57 percent of awards in 2016).

The 2016 Education Review Office (ERO) report on the pathways reinforced this picture. ERO reported that “in most schools, vocational pathways were functioning as an add-on to a traditional curriculum model, and their influence on curriculum was limited”. They also reported that vocational pathways still lacked “parity of esteem” with other pathways: “A perception that ‘vocational’ education is less rigorous or prestigious than the more traditional academic track persists among some school leaders, students and whānau”.

A less formal evaluation of implementation by secondary-tertiary leads in ministry regional offices found only 35-40 percent of 525 schools were “exhibiting some knowledge and understanding about vocational pathways and ... collaborating with tertiary, industry and communities”, and only two percent of the schools showed “developed” use of the pathways for curriculum review and design.

As the annual report said last year, “the vocational pathways continue to be a promising initiative that is poorly resourced for implementation and as a result will probably never achieve its potential”. In fact, in the middle of 2016 the ministry tried to wind up its advisory group on the pathways, and it only survives because of protests by PPTA and BusinessNZ to the minister. There has been no progress in the last year on finding a way to give awards for Level 3 pathways, largely because the ministry’s only solution for Level 3 vocational courses is through secondary-tertiary partnerships that involve students being out of school for at least two days every week.

Work on defining employability skills has been somewhat more productive, with a final list of the skills posted on the Youth Guarantee website in February 2017. (These can found at <http://www.youthguarantee.net.nz/vocational-pathways/employability-skills/employability-skills-framework>. Discussions have now begun on some kind of standardised way that students might provide evidence of their skills as they move into the workforce.)

## POSITIVE BEHAVIOUR FOR LEARNING (PB4L)

Considerable sums of money have gone into supporting PB4L but with mixed results that can be largely explained by the quality of the implementation in schools. The New Zealand Council for Educational Research (NZCER) report indicated that it was a viable system when well implemented. Consequently, PPTA members have always been somewhat divided in their views of the programme. PB4L was initially well-resourced, staffed and evidence-based; however this has begun to change and the learning support update confirmed our earlier concerns that the government planned to double the number of schools in the programme without increasing the total funding. PPTA’s response was to re-establish the behaviour taskforce and it submitted to the ministry to ensure that any changes do not compromise the programmes already running. There was an overwhelming response to the PB4L conference with numbers being capped at capacity six weeks before registration closed, indicating a great deal of support for the programme from the wider sector.

## SPECIAL EDUCATION

The “Special Education Update” process announced in December 2015 appears to have resulted in very little to date, which is hardly surprising given that it was launched with the message that “there is no more money”. A new delivery model was “piloted” in the first few months of 2017 in the Bay of Plenty, working with three communities of learning, and this form of delivery is now being made available to up to 30 more communities should they choose to use it. The use of the term ‘pilot’ appears to be a misnomer as there is not a rigid delivery model and there does not appear to be a formal evaluation process happening.



One small glimmer of progress is the work to introduce a dispute resolution process. However, like so many ministry initiatives, it is starting in three regions as a “phased implementation”, and at the time of writing there had been no start date announced.

PPTA continues to monitor Resource Teachers: Learning and Behaviour (RTL) clusters amid rumours of further restructuring, particularly in response to the establishment of communities of learning. An ERO review of the RTL service is to be published soon, and RTLBs are confident this will convey a much more positive picture of their service than the last ERO report did.

In November 2016, the Education and Science Select Committee released the report of its investigation into the identification and support for students with dyslexia, dyspraxia and autism spectrum disorders in primary and secondary schools. It contained 46 joint recommendations, plus a further 26 from the minority parties. Some of these would be very useful if implemented, however the ministry of education has a splendid record of doing very little in response to select committee recommendations so PPTA is not highly optimistic about progress.

One recommendation was about flexible learning spaces and concerns that submitters, including PPTA, had raised about the appropriateness of these for some students, especially those on the autism spectrum. The recommendation required the government to get research done on their effect on these students. There was another recommendation requiring the government to investigate having a full-time Special Education Needs Coordinator (SENCO) for every school with 200+ students. Considering that currently there is no dedicated staffing for a SENCO role at all, this would be a significant improvement if it were implemented.

## MIDDLE LEADERS

PPTA’s Middle Leadership Taskforce, established in 2015, has presented papers and reports to annual conference every year since then, highlighting the crisis around recruitment and retention of middle leaders as a result of the intolerable workload they face. The taskforce has submitted proposals to Conditions Strategy Committee for claims for the 2018 STCA round that seek to address this crisis through measures in relation to time and units.

In addition, some of the recommendations of the Workload Working Group, if they were progressed by the parties to that report, would help with this crisis, for example, measures to stop over-engineering in the areas of assessment and performance appraisal, and promotion of the use of support staff to free up middle leaders to concentrate on leadership of teaching and learning.

The Supply Working Group also identified issues with middle leadership. They recommended that the agencies “consider appropriate solutions to problems with recruitment and retention of middle leaders in regard to remuneration, manageability, PLD, the status of the role, and the impact of communities of learning”. The lead agency on this recommendation is the ministry, and progress to date has been slow.

Clearly the solutions for middle leadership largely lie in a successful collective agreement round in 2018.

## SAFER SCHOOLS

Over the last few years, PPTA has delivered more than 85 “Safer Schools for All” workshops in 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 Council of Trade Union's Out@Work conference held in Wellington in December 2016. There was considerable interest in our work as we are well ahead of some unions in terms of focussing on LGBTIQ+ workers.

The PPTA Rainbow Taskforce updated and released the publication *'Affirming diversity of sexualities and gender identities in the school community: Guidelines for principals, boards of trustees and teachers'* at the end of May. This was met with a flurry of media interest, and resulted in a number of media appearances for taskforce members.

The Rainbow Taskforce continues to be active in supporting Pink Shirt Day, sitting on the advisory group. This year Pink Shirt Day came at the end of a full week of anti-bullying activities that started on 22 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.



## THE EDUCATION COUNCIL

Since PPTA members' decision in June 2016 to re-engage with the Education Council, PPTA staff have been kept busy engaging with council staff about an ever-increasing array of issues.

A major piece of work has been the development of a new Code and Standards. PPTA supports the shift to six generic standards from the previous twelve, and is pleased that the council has acted on requests from PPTA that they make it very clear that teachers are not required to provide evidence against the indicators (now termed "elaborations"). The material contains the following sentence: "For the purposes of appraisal, it is not expected that teachers would need to identify evidence of individual elaborations; however, the evidence of the quality of their practice would need to be sufficient to reflect the standard."

PPTA's submission on the code was less enthusiastic, as our members have always been strong supporters of the Teachers Council's code of ethics. However, we do acknowledge that the new code is not the punitive document that the term "Code of Conduct" in the legislation had indicated it would be, and the council has taken note of the feedback from its advisory group on the positioning and content of the "Examples in practice" for the code, which have been published separately from the code itself, and prefaced with the comment: "The positive examples in this guidance are not to be used as a check list to be assessed on or measured against."

PPTA has been pleased to see the council taking a more flexible approach to registration / certification decisions than was the case previously, but their staff have to work with a registration policy that includes rigidities such as the 0.5 minimum position to move from provisional to full certification. This policy is now under review, and PPTA representatives on the advisory group are hopeful that progress towards a more responsive and flexible registration framework can be made.

PPTA has worked constructively with the council to develop a memorandum of understanding (MOU) between schools to support provisionally certificated teachers who are doing relieving across the schools over a period of time, to enable them to reach full certification and not be forced to do a Teacher Education Refresh (TER) course. The MOU comes with a small allocation of funds to support a mentor in a host school. Unfortunately, the take-up of this scheme has been very low, and PPTA is keen to encourage more schools to access it.

The council's staffing appears to grow weekly as it launches into one enterprise after another under the heading of "professional leadership". The announcement that the council will take over responsibility for teacher professional learning from 1 January 2018 is the most concerning. The current structure for delivery of centrally funded PLD, unwieldy as it is, relies on the work of the regional offices of the ministry of education. How this can be handed over to the council without having to be subject to significant further change is a mystery to PPTA.

In April 2017 the council published a consultation document about a range of fee increases planned for 1 July 2019, when interim government funding will cease. PPTA's submission opposed all of these, on the grounds that the fee increases were largely justified by the planned expansion of the council's role in "professional leadership", an expansion which PPTA does not support. PPTA has consistently taken the view that the council's role should be to run the registration system, manage competence and discipline matters where they are sufficiently serious that they may impact on a teacher's right to remain registered, authorise and monitor teacher education

programmes, and provide professional development that relates to these functions but not beyond that. A final decision about the fee increases has not been announced.

## INITIAL TEACHER EDUCATION (ITE)

The major issue for initial teacher education in the last year has been whether there would be a requirement for all ITE programmes to become postgraduate qualifications. This was one of the recommendations of the government's Education Workforce Advisory Committee in 2010.

The Education Council, since its inception in July 2015, has put out a succession of discussion papers floating the idea, however its latest paper, published in June 2017, pulled back from moving fast on this.

This was despite the Council of Deans of Education, earlier in 2017, making a decision that all university providers of ITE would disestablish their graduate diplomas in teaching from the end of 2018 and replace them with postgraduate diplomas from 2019. The deans justified this on a number of grounds, including that their numbers have been in decline for some time and they can no longer afford to run both graduate diploma and masters programmes, and they would prefer to all move together to focusing entirely on postgraduate diplomas.

They recognised, however, that there are significant equity concerns about this, especially given the current government's removal of access to loans and allowances for postgraduate students. This could impact significantly on the diversity of their intakes to ITE.

At the time of writing, there have been no announcements from government about whether the current pilot masters programmes in ITE will continue to be funded. The Education Council has recognised that rapid moves to only postgraduate ITE qualifications would be problematic for equity, and also for teacher supply more generally. Their focus appears to be shifting to improving the quality of graduates from the current programmes, improving the delivery of practicum, and strengthening their requirements for approval of programmes.

In the meantime, the government is moving ahead on freeing up access to "employment-based trainee teacher positions" which were enabled by a change in the Education Act which came into effect on 29 October 2016. PPTA saw this change, which was effected by a last-minute supplementary order paper from the minister, as a slap in the face for our win in the Employment Tribunal in relation to the appointment processes for Teach First NZ participants. The Act now overrides that ruling of the tribunal by establishing these "trainee teacher positions" which allow a school, with agreement from the Secretary for Education, to employ someone as a "trainee teacher". The ministry of education is currently consulting on guidelines for this which would require the "trainee teacher" to be enrolled in an initial teacher education programme and be mentored by the school. PPTA is arguing that these guidelines should be regulations to give them the necessary enforcement power.

At the time of writing, the only ITE programme which is employment-based is the Teach First NZ programme, and they are still waiting for Education Council approval for their new ITE partner, Mindlab at Unitec, to be approved to run the programme because Auckland University has withdrawn from the partnership. Mindlab has no history of offering initial teacher education, and it is possible they won't receive Education Council approval in time for the 2018 cohort to begin this November.

PPTA continues to host twice-yearly meetings of secondary ITE programme leaders, and these are very beneficial both to them and to PPTA.

## PROFESSIONAL LEARNING AND DEVELOPMENT (PLD)

The ministry has implemented its newest restructure of PLD this year, and it is proving to be as much of a disaster as previous iterations. PLD delivery through regional school support services offices began to be demolished in 2011.

Things have essentially gone from bad to worse since that time, to the stage where secondary teachers are almost totally unable to access any subject-specific PLD whatsoever. It might not have been that disastrous if the ministry had acted on the recommendations of the working group on 'networks of expertise'. The working group developed a model for supporting subject and other professional associations and networks through a hub which would be run by an independent body, possibly the Teachers' Refresher Course Committee (TRCC), but with substantial government funding.

The working group's recommendations were received by the PLD implementation group in May 2016, and the ministry seemed to begin to wrestle with the issues later in 2016, then the trail went cold. They did contract the TRCC to do a 'needs analysis' of the associations and networks, which told them only what they already knew, that these groups are run by heroic volunteer teachers who lack the capacity to do any more unless they receive substantial support and resourcing.

Instead of negotiating with an independent body to run the hub, as recommended, they started doing exactly what their working group had advised them not to do, that is, funding selected subject associations for finite projects that fit ministry priorities rather than teachers' needs. In the meantime, the vast majority of subject associations continue to struggle on trying to do valuable work with very little money or time.

Apart from that, some schools are accessing PLD funding as long as they can find the time to (a) do the extensive data crunching required to justify it, (b) get through the various application hoops, (c) identify an "accredited" person to deliver the PLD who is available and has relevant skills, (d) write up how they spent the money so they have a chance of accessing more funding some other time. The funding they are accessing is largely, it would appear, being used for school-wide initiatives, not to meet the needs of individual secondary teachers wanting subject-specific help.

The only other source of PLD funding is schools' own operational grants, and teachers are very aware of the multiple conflicting demands on this. PPTA members should remember, nevertheless, that under the good employer requirements of the STCA and ASTCA, the employer is obliged to "make provision for ... opportunities for the enhancement of the abilities of individual employees", and this includes access to relevant PLD, especially when a need has been identified through performance appraisal processes.

## WELLBEING IN SCHOOLS

With the introduction of the Health and Safety at Work Act (2015), in April 2016 there was a real opportunity to advance wellbeing as it is now covered by the Act.

The main purpose of the act is to provide for a balanced framework to secure the health and safety of workers and workplaces by protecting workers and other persons against harm to their health, safety, and welfare by eliminating or minimising risks arising from work or from prescribed high-risk plant.

'Health' is defined in the Act as physical and mental health.

The Ministry of Education has a wellbeing page on its website:

<https://education.govt.nz/ministry-of-education/specific-initiatives/health-and-safety/staff-wellbeing/>



*Participants at a PPTA level two Health and Safety course 2017*

## PPTA ANNUAL CONFERENCE

The supreme decision making forum for PPTA is annual conference, which is held in the first week of the term three holidays, and attended by around 140 delegates and representatives from the 24 regions and networks.

Setting policy at conference means PPTA is well prepared to address the range of current and up-coming issues that matter to secondary teachers. At the 2016 conference members discussed and voted on the following papers:

- Draft principles for partnerships between secondary schools and initial teacher education.
- The middle leadership problem.
- Establishment of a men's network.
- Teachers in the precariat: fixed term contracts and the effect on establishing teachers.
- From the top corridor to the back field: supporting senior leaders to lead effective change.
- Real equity funding: resourcing schools to support at-risk learners.

Conference 2016 also saw presentations from Robyn Baker from NZCER on professional learning and development, a panel discussion from the opposition education spokespeople (the minister withdrew at short notice), Sam Huggard, the CTU Secretary, Maurie Mulheron from the NSW Teachers Federation, Allan Vester (SPC chair) and in the spirit of union solidarity following the Better Funding, not Bulk Funding campaign, Louise Green, the NZEI president. This was the first time that an NZEI president had been invited to deliver a keynote speech at a PPTA conference, and PPTA president Angela Roberts did the same at the NZEI conference a few days earlier.

## PPTA SERVICE AWARDS

MIS 6/14

7 August 2017



**To: Conference Delegates**

### **PPTA SERVICE AWARDS 2017**

Annual PPTA Service Awards are designed to recognise significant contributions members or former members have made to fellow members and the Association through their activism and commitment.

Thus, it is with great pleasure that I announce the following as the recipients of the PPTA Service Award for 2017:

<b>Name</b>	<b>Branch</b>	<b>Region</b>
Marie Campbell	Mangere College	Auckland
Sue Plyler (Retired)	Lately of Howick College	Auckland
Trevor Wilson (Retired)	Lately of Mt Roskill Grammar School	Auckland
Christine Hodge	Napier Girls' High School	Hawke's Bay
Verity Rowsell-Starkey	Mahurangi College	Northland Lower
Vinnie Monga	Fairfield College	Waikato
Marg Andrew	Hamilton Girls' High School	Waikato
Francis van Buren	Huntly College	Waikato

**Michael Stevenson**  
**GENERAL SECRETARY**



## ISSUES AND ORGANISING SEMINAR

This year's regional officers training day was held at the Brentwood Hotel in Wellington on Friday 3 March. The Issues and Organising seminar followed on 4 and 5 March. Approximately 130 members attended some or all of the three days.

Saturday morning's keynote speaker, Professor Martin Thrupp of Waikato University, laid the groundwork for the seminar's theme: *Advancing Public Education*. He stressed that "only a public education system ... holds the promise of delivering a high quality education to all New Zealand families, regardless of how rich or poor they are." (Thrupp 2014).

In the afternoon, Mark Chenery of Common Cause Australia spoke about using values and frames to motivate change, arguing that activists and others can only get their messages across if they frame them in terms of the intrinsic values of their audiences. This presentation was particularly well received with attendees reporting that they saw his ideas having application in both the activist role and in the classroom.

Workshops on topics such as supply and workload, communities of learning, flexible learning spaces, health and safety, recruitment, PB4L, and the Code of Professional Responsibility and Standards were all well attended. Each provided a forum for members from around the country to discuss issues and gave staff members working in those areas the opportunity to hear more about members' key concerns.

## AUCKLAND ACTIVISM

The PPTA Auckland region has continued to see significant growth in activism over the last 12 months.

The region sent a large delegation to the biennial NETs Conference in Kaiapoi in April 2017. Almost half of all the conference delegates were brought along by PPTA Auckland.

In January 2017, the regional committee decided to change the model of regional meetings filled with motions and reports, and instead hold hui that focus on professional development and education activism, with dinner and wine provided. This model has been very successful. The Term 2 hui was a talk and Q&A session with Professor Welby Ings, author of *Disobedient Teaching*, with about 100 members present. The Term 3 hui was an education election forum, with the Minister of Education and other MPs, with nearly 300 members present.

The region has also worked with NZEI's Auckland branch to lobby the government to address teacher shortages and living costs in Auckland.

## SUPPORTING MEMBERS IN CHRISTCHURCH AND KAIKOURA

Teachers working in Christchurch and Kaikoura continue to be under considerable stress from the earthquakes, with students exhibiting signs of post-traumatic stress disorder and anxiety, teachers and students experiencing changes and instability in physical structures at home and school, co-locations and closures, and major reconstruction works or 'innovative learning environment' rebuilds underway. There has also been a looming threat of changes to technology provision to intermediate and primary aged students, which has required time from PPTA staff to be involved in a ministry 'non-review' and other processes.

The PPTA Earthquake Recovery Taskforce has changed its meeting arrangements so that they are meeting with teachers and senior leaders in schools that are identified as needing support, such as Aranui prior to its closure, and Shirley Boys' and Avonside Girls' which are to be co-located. A key activity has been to promote the availability of the Employee Assistance Programme (EAP) to teachers.

The PPTA president and general secretary visited the Kaikoura branch after the earthquake in 2016 and members / regions have been very generous in donating to the emergency relief fund for those teachers. The physical damage and proximity of Kaikoura post-quake has added an additional element of isolation for those teachers and students, including limited access to mental health services and professional development. Access to emergency housing is also an issue.

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## NETWORKS

### NETWORK OF ESTABLISHING TEACHERS

April 2017 saw the second conference for new and establishing teachers (NETs). This year the conference was held at Blue Skies, Kaiapoi and was attended by about 50 PPTA members from across the motu. Overall, the feedback was positive, with members enjoying the mix of workshops, keynotes and panels. Members also appreciated the opportunity to network with other establishing teachers. The Establishing Teachers' Committee is looking into running another conference in April 2019, confirming this as a biennial event.

The Establishing Teachers Committee in 2017 is changing the way its members are selected. Until now it has been selected each year from the NETS who attend Issues and Organising Conference. From now the committee will be selected by the president and general secretary from self-nominations, which is more in line with other networks' committees.

The NETS have taken a lead in 2017 in promoting the Promise to New Teachers, which came from a NETS and Auckland regional paper to Annual Conference 2016.

### PPTA WOMEN'S NETWORK

The PPTA women's network has been busy over the past year with women's meetings and events for members being held around the country. The focus has been on:

- developing and maintain strong communication links for women members within and between regions, national office and the executive;
- increasing the number of women contacts in branches in each region.

Additional goals for the women's network in 2017 were:

- campaigning on extending paid parental leave (including for partners), domestic violence leave, and equal pay;
- supporting members who work part-time to achieve pro-rata non-contact time;
- helping to ensure that the only fixed-term contracts that apply to PPTA members are legal ones;
- knowing your rights in the collective agreements (including encouraging members to attend Mahi Tika training);
- supporting women in leadership roles in teaching;

- speaking to MPs during the election campaign about education priorities for PPTA and the issues for women outlined above.

A highlight for the PPTA women’s network was attending the NZCTU women’s conference held in Wellington. The conference theme was “Mana Wāhine” and there was a mix of strong women key note speakers, panellists, workshops and equal pay campaign activity.

This year we designed the programme of the CTU women’s conference to have skills-based workshops covering different topics.

Five union women were recognised at the CTU women’s awards’ ceremony for leadership or campaigning on equal pay, and we all raised our glasses to toast equal pay with Kristine Bartlett, who took the landmark equal pay case with the SFWU.



*PPTA delegation on the first day of the CTU women’s conference 2017.*

## KOMITI PASIFIKA

Last year was 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 representatives attended the CTU 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 hugely successful fono Talanoa for Pasifika Success. The chair of the Komiti also accompanied the presidential team and the women’s officer to the COPE conference in Fiji.

## PRINCIPALS' REPRESENTATION

The Secondary Principals' Council (NZSPC) provides a very important voice in PPTA, giving a perspective on school management, funding and regulation that is not always apparent from the classroom. NZSPC meets four times a year and represents PPTA on numerous reference groups with education sector agencies.

This year the long-standing chair of NZSPC, Allan Vester, stood down and James Morris, of Darfield High School took on the role. Issues of teacher supply, unsurprisingly, have been the main media focus for James so far this year.



*SPC Chair, James Morris*

## MEMBERSHIP EDUCATION

Membership education is critical for ensuring members are well prepared for the roles they play in branches. Our Mahi Tika training programme includes courses for provisionally certified teachers, and our Mahi Tika levels 1, 2 and 3 courses, develop members' understanding of our collective agreement and legislation, and develop skills to assist in resolving workplace issues. PPTA also offers specific courses for Pasifika teachers and Māori teachers and this year responded to requests from regions for additional Mahi Tika courses in Tauranga and the West Coast. We also offer a course on employment relations for principals, we have held courses across the country for staff representatives on boards of trustees, and we respond to requests from regions for Treaty of Waitangi training.

With the introduction of the Health and Safety at Work Act, from April 2016 we have had high demand from schools for our health and safety training. We currently offer initial training and stage two courses for elected health and safety representatives, and a course for school principals,

which has been held in Auckland, Wellington, and Christchurch. We have also responded to requests from regions and schools, and have held courses in Gisborne and Hastings, and have provided both initial and stage two training to staff at James Cook High School and Alfriston College, who organised their health and safety representatives to attend training together. PPTA also initiated the establishment of a trust in conjunction with some other CTU affiliated unions to act as a governance body for the delivery of union health and safety programmes. This Workers Education Trust is now named Kaimahi Mātauranga.

Over the 2016 year approximately 1000 PPTA members participated in our membership education programme. This is a large commitment from the association to ensuring that members have access to training that supports them in their activities.

## HEALTH AND SAFETY

The Health and Safety at Work Act 2015, enacted in April 2016, gave PPTA the opportunity to further develop health and safety representative training courses which are being delivered up to stage two as well as a managers course for principals, deputy principals and executive officers. A stage three course is in the final stages of development. Two staff members undertook health and safety training and became accredited providers able to deliver the course. By the end of term two, 2017, PPTA will have trained around 980 representatives across all levels.

PPTA successfully lead the establishment of the Workers Education Trust in conjunction with the New Zealand Nurses Organisation, the Public Service Association, the Rail Transport and Maritime Union and Dairy Workers Union to act as the governance body for the delivery of union health and safety programmes.

## COMMUNICATIONS

### *PPTA NEWS*

The PPTA News magazine has dropped back from 11 issues a year to seven larger issues split up by term. This allows more time for feature style pieces and mitigates issues with NZ Post cutting delivery days.

### *NEWSLETTERS*

To communicate pressing and time bound issues we are now sending regular email newsletters to groups of members using the Campaign Monitor programme. These include the Collective News and newsletters for the NETs, women, rainbow, Te Huarahi, Pasifika, area school and NZSPC networks. Each network has four newsletters scheduled for the year, spread out over each term. Should they want any extra for various reasons this is very easy to do on request.

Members have the ability to unsubscribe but so far very few have done so. The size of the groups we mail to range from 23 (PPTA women's network) to 3828 (NETs) and we encourage recipients to share them with others who might be interested.

The Campaign Monitor software also provides data about who is opening emails, where and when. Our open rate sits around 50 percent with the highest at 85 percent followed by 67.24 percent. The average open rate for most organisations that send out email newsletters is just under 25 percent, which shows PPTA members are quite engaged. The most popular links members respond to are the member benefit discounts, followed by information on conferences and issues specific to their interest groups, such as equal pay or area school PUMs.

## SOCIAL MEDIA

PPTA continues to find social media a useful way to communicate with members and the wider community, including international groups and education commentators. PPTA uses Facebook and Twitter to build the profile of PPTA as an authoritative voice in the sector, to help ensure New Zealand secondary teachers' voices are heard, to encourage dialogue and debate and to share best practice. Member engagement on social media certainly varies according to time-of-the-term and teacher workload. PPTA Facebook groups are a safe and welcoming space for PPTA members to raise questions and have robust debate.

Our public Facebook pages are:

- PPTA [www.facebook.com/NZPPTA](http://www.facebook.com/NZPPTA)
- PPTA Women [www.facebook.com/PPTA-Women-665289063499540](http://www.facebook.com/PPTA-Women-665289063499540)
- PPTA Pasifika [www.facebook.com/komitipasifika](http://www.facebook.com/komitipasifika)

Our member-only Facebook groups are:

- PPTA new teachers
- PPTA women's group
- PPTA rainbow network

Contact us if you wish to join one of the member-only PPTA Facebook groups

Our Twitter accounts are:

- @PPTAWeb
- @PPTANews
- @PPTA\_PIU (professional issues)
- @PPTA\_NETs

The website platform upgrade was completed in December 2016. This has enabled a much more user-friendly interface, particularly for mobile devices. Around 40 percent of all website users are using the site with mobile or tablet devices and the majority of users are looking for collective agreement advice.

## TE HUARAHĪ MĀORI MOTUHAKE

Te Huarahi Māori Motuhake is the Māori executive of the PPTA and its members are elected along iwi geographical boundaries comprising Tai Tokerau, Tāmaki Makaurau, Waikato, Mataatua, Te Arawa, Tai Rāwhiti, Taranaki, Whanganui, Horowhenua / Manawatu, Ngāti Kahungunu, Whanganui-ā-Tara ki Ōtāki, Awakairangi / Wairarapa, Ōtepoti / Murihiku, Waitaha and Te Tau Ihu o Te Waka ā Maui.

Te Huarahi Māori Motuhake provides professional leadership on kaupapa Māori education policy and political initiatives. They work alongside their membership in schools and wider communities to build strong whānau connections and effective engagement in support of Māori student learning and achievement to be successful as Māori, and as learners.

In terms of involvement in significant events on the Māori Education calendar, Te Huarahi Māori Motuhake advocate for bilingual education and the survival of te reo Māori, and in support of Matariki celebrations and Māori cultural festivals embracing Ngā Mahi ā Rehia.



## MĀORI TEACHERS' CONFERENCE

The 22<sup>nd</sup> NZPPTA National Māori Teachers' Conference 2016 was held at the beautiful Sudima Lake Rotorua Hotel in Rotorua, located amidst the geothermal wonders of Te Rotorua-nui-ā-Kahumatamomoe. The theme of Pathways for Māori Success Te Ao Māori and Te Ao Whānui provided the ideal context for delegates to delve into the world of Mātauranga Māori and its timeless relevance for Māori education, success and achievement.

Rongoa Māori of the healing kind, Māori wellbeing and identity, Māori pathways, Māori literature and poetry and Pūtaiao blended to give a deep sense of rejuvenation and reinvigoration that helped delegates to rebalance and reconnect with one another. In essence, a very grounding and clearly informing hui. Tihei mauri ora!

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PPTA EXECUTIVE ETHICS COMMITTEE ACTIVITIES FOR THE YEAR TO 30 JUNE  
2017

There were no cases before the Ethics Committee.



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## EXTERNAL LINKS

### LIAISON WITH OTHER EDUCATION GROUPS AND NETWORKS

The role of PPTA as a ‘thought leader’ for secondary education is very important. Building and maintaining credibility as the go-to organisation for anything to do with secondary schooling means that our ideas get momentum and are spread wider than we can broadcast them ourselves.

Supporting the New Zealand Association for Research in Education (NZARE) Conference in November 2016 was a good example of this. PPTA sponsored Professor Gary Miron from the University of Western Michigan to come to New Zealand, primarily to talk about online schools. While he was here he delivered a very well-received keynote address at NZARE, a conference attended by most teacher educators and education researchers.

PPTA also maintains very strong connections with subject associations, organising the only annual meeting of all the subject associations in the term 1 break each year. Along with the subject associations, organisations like the specialist classroom teachers’ association and guidance counsellors’ associations are also important relationships for PPTA.

PPTA also maintains connections with education activists such as the Quality Public Education Coalition and Save Our Schools, and researchers from across the spectrum.

### NATIONAL EDUCATION LEADERS PARTNERSHIP (NELP)

In 2014 PPTA proposed a meeting of all the heads of the main representative education sector organisations to develop a joint approach to the upcoming review of school funding. The first hui was held in early 2015. Since then NELP has become an established part of the education landscape. While all of the groups involved in NELP meet regularly, until now it has always been under the auspices of the ministry; what is unique about this forum is that it is the representatives of the sector organising and advocating for themselves.

This year NELP has extended its remit wider than the proposed changes to school funding. Top of the agenda has been communities of learning. To this end NELP has written to the minister with a shared statement asking for a number of commitments and changes to the ways that CoL are being implemented, and met jointly with the minister about this. A number of changes are underway as a result.

Alongside PPTA, the active members of NELP are:

- NZEI
- NZSTA (boards of trustees)
- SPANZ (secondary principals)
- NZPF (primary principals)
- NZAIMS (intermediates and middle schools)
- NZASA (area schools)
- NZSPC (PPTA member principals)
- APIS (Catholic schools)
- SEPANZ (special education schools)

The group’s meetings are generally supported by an independent academic advisor and PPTA and NZEI staff.

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## 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 and other office holders are regularly invited to AEU conferences and the AEU vice-president, Maurie Mulheron, was a guest speaker at the PPTA annual conference. The general secretary meets biannually with all the secretaries of the AEU state and territory branches. 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 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.

Following two years of research, EI released a May 2017 report titled *Organising Teaching: Developing the Power of the Profession* (Bascia, N and Stevenson, H). New Zealand was one of seven countries put under the spotlight to produce nation case studies. The branch-based structure of PPTA and our 2016 campaign with NZEI against bulk funding were highlighted as two particular strengths.

PPTA was represented by president Jack Boyle at the International Summit of the Teaching Profession (ISTP) in March in Edinburgh. At that meeting the president was part of a New Zealand delegation that included Hekia Parata, the minister of education at the time. The New Zealand delegation decided on two main goals, both centred on wellbeing.

### Education International

### COUNCIL OF PACIFIC EDUCATION (COPE)

PPTA also plays an active part in the Council of Pacific Education and contributes financially to assist COPE with their union and education projects within the Pacific. The presidential team along with the chair of Komiti Pasifika and the women's officer attended the annual conference in Nadi last year.

### UNIONAID

UnionAID is the international development charity for the union movement. It funds projects that support workers' rights, capacity-building of unions and the promotion of human rights in the Asia and Pacific region. The work and reach of UnionAID continues to grow, with many PPTA members, regions and staff supporting it financially and through fundraising events, such as May Day dinners and the bi-annual raffle sales. This has allowed an expansion of projects in Myanmar

(such as the continued growth of the Myanmar Young Leaders' programme and the school near the Thailand border), with the Dalit people and building cooperatives in India.

UnionAID



**UnionAID**

Better Work, Better World

**2017 Wellington Inter-union quiz  
and Burmese dinner**

**24 February, doors open 5:30pm**

**Loaves and Fishes, Thorndon**

**\$30 per person**

Organise your team of up to 10 people and RSVP to [michael@unionaid.org.nz](mailto:michael@unionaid.org.nz)

CONSOLIDATED FINANCIAL STATEMENTS FOR THE YEAR ENDING 31 MARCH  
2017

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



NZPPTA  
Consolidated Financia

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

**CONSOLIDATED FINANCIAL STATEMENTS**  
**For the year ended 31 March 2017**

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

### Statement of Financial Performance

For the year ended 31 March 2017

National Office 2016	NZPPTA 2016		Note	National Office 2017	2017 Budget	NZPPTA 2017
<b>INCOME</b>						
9,965,002	9,465,052	Subscriptions	(9)	9,722,719	9,573,400	9,722,719
202,059	230,244	Interest Income		135,779	210,000	160,746
14,917	14,917	Health & Safety Training Income		160,031	-	160,031
39,098	91,193	Miscellaneous Income		24,675	20,000	25,847
7,700	3,200	PPTA News Advertising		1,000	-	1,000
4,204	4,204	Rental of President's Flat		27,132	-	27,132
9,652	9,652	Special Interest Conferences		32,283	-	32,282
59,959	50,959	Office Lease Income		57,135	-	57,135
<b>9,847,152</b>	<b>9,879,428</b>	<b>Total Income</b>		<b>10,160,953</b>	<b>9,803,400</b>	<b>10,166,892</b>
<b>EXPENDITURE</b>						
1,478,858	1,481,291	Administration & Finance	(14)	1,496,727	1,556,879	1,498,040
1,495,334	1,409,503	General Secretariat	(14)	1,491,090	1,651,500	1,439,076
389,529	380,829	Māori Activities	(14)	376,753	405,000	375,753
3,719,402	3,719,402	Membership Services	(14)	3,839,587	3,742,800	3,634,567
2,177,922	2,177,922	Policy & Advocacy	(14)	2,259,086	2,167,950	2,259,086
146,828	147,383	Depreciation	(5)	144,088	159,000	144,645
-	-	Surplus Staffing Reserve		-	30,000	-
-	-	Mahi Tika Reserve		-	5,000	-
<b>9,408,953</b>	<b>9,445,130</b>	<b>Total Expenditure</b>		<b>9,605,219</b>	<b>9,719,125</b>	<b>9,555,167</b>
<b>438,169</b>	<b>463,298</b>	<b>NET SURPLUS BEFORE TAXATION</b>		<b>554,634</b>	<b>84,275</b>	<b>631,725</b>
58,453	85,835	Tax Expense	(5)	43,278	62,000	50,850
<b>379,716</b>	<b>397,663</b>	<b>SURPLUS FOR YEAR AFTER TAXATION</b>		<b>511,356</b>	<b>22,275</b>	<b>581,635</b>

This document is to be read in conjunction with the notes to the financial statements.

**IBDO**

800 WELLINGTON

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

### Statement of Changes in Equity

For the year ended 31 March 2017

National Office 2016	NZPPTA 2016		Note	National Office 2017	NZPPTA 2017
<u>5,571,538</u>	<u>5,816,887</u>	Accumulated Funds Start of year		<u>5,951,254</u>	<u>7,018,550</u>
<u>378,716</u>	<u>397,563</u>	Total Comprehensive Income/(debt)		<u>511,336</u>	<u>301,636</u>
<u>5,951,254</u>	<u>7,018,550</u>	Accumulated Funds End of year		<u>6,462,590</u>	<u>7,320,186</u>

# New Zealand Post Primary Teachers' Association (Inc)

## Statement of Financial Position

as at 31 March 2017

National Office 2016	NZPPTA 2016		Notes	National Office 2017	NZPPTA 2017
<b>Current Assets</b>					
2,902,885	3,283,565	Cash at Bank	2	1,460,746	1,800,399
10,499	57,420	Accounts Receivable	3	49,917	92,295
2,630,000	3,322,468	Investments	7	4,201,912	4,900,210
5,142	5,142	Imprest Advances		5,142	5,142
-	-	Income Tax Receivable		6,061	6,061
262,690	282,690	Other Current Assets		262,925	262,925
<b>5,820,016</b>	<b>6,931,285</b>			<b>5,986,703</b>	<b>7,167,032</b>
<b>Current Liabilities</b>					
341,996	394,719	Trade Creditors		533,264	574,211
853,528	853,526	Employee Creditors	4	731,231	731,231
208,479	208,479	GST Payable		137,836	137,836
1,440	1,440	Income Tax Payable	5	-	-
-	-	Lease Payments	19	36,391	36,391
53,847	53,847	Other Current Liabilities		88,595	68,595
<b>1,459,288</b>	<b>1,512,011</b>			<b>1,507,317</b>	<b>1,548,264</b>
<b>4,360,728</b>	<b>5,419,274</b>	<b>Working Capital</b>		<b>4,479,386</b>	<b>5,608,768</b>
<b>Non Current Assets</b>					
250,103	250,103	Investments	7	800,000	600,000
1,905,515	1,912,265	Property, Plant & Equipment	6	2,078,183	2,082,378
<b>2,155,618</b>	<b>2,162,368</b>			<b>2,878,183</b>	<b>2,682,378</b>
<b>Non Current Liabilities</b>					
-	-	Lease Payments	19	142,532	142,532
565,092	565,092	Employee Creditors	4	550,427	550,427
<b>565,092</b>	<b>565,092</b>			<b>692,959</b>	<b>692,959</b>
<b>5,951,254</b>	<b>7,016,550</b>	<b>Net Assets</b>		<b>6,462,610</b>	<b>7,598,185</b>
<i>Represented by</i>					
<b>5,951,254</b>	<b>7,016,550</b>	<b>Accumulated Funds</b>		<b>6,462,610</b>	<b>7,598,185</b>

On behalf of the Executive

  
 Michael Stevenson - General Secretary

7<sup>th</sup> August 2017  
 Date

  
 Jack Boyle - President

7/8/2017  
 Date



**New Zealand Post Primary Teachers' Association (Inc)**  
**Statement of Cashflows**  
For the year ended 31 March 2017

	2017 National Office	2016 NZPPTA	2016 National Office	2015 NZPPTA
<b>Cashflow from Operating Activities</b>				
<i>Cash was provided from:</i>				
Receipts From Customers	9,902,927	9,909,246	9,535,740	9,554,795
Interest received	135,584	160,746	202,081	230,241
Net GST	-	-	50,434	50,434
	<u>10,038,511</u>	<u>10,069,992</u>	<u>9,788,255</u>	<u>9,835,470</u>
<i>Cash was applied to:</i>				
Payments To Suppliers	3,711,799	3,574,509	4,001,460	4,004,527
Payments to Employees	5,588,583	5,568,583	5,460,840	5,460,840
Net GST	70,643	70,643	-	-
Income Tax Refunded	47,899	54,711	52,624	60,008
	<u>9,419,924</u>	<u>9,268,446</u>	<u>9,515,124</u>	<u>8,525,375</u>
<b>Net Cash Inflow/(Outflow) from Operating Activities</b>	<b>618,587</b>	<b>801,546</b>	<b>273,131</b>	<b>1,310,095</b>
<b>Cash Flow From Investing Activities</b>				
<i>Cash was provided from:</i>				
Sale of Investments	-	-	2,209,485	2,127,818
	-	-	<u>2,209,485</u>	<u>2,127,818</u>
<i>Cash was applied to:</i>				
Purchase of Investments	1,921,809	1,927,839	-	-
Purchase of Fixed Assets	138,717	139,075	21,225	30,685
	<u>2,060,526</u>	<u>2,066,914</u>	<u>21,225</u>	<u>30,685</u>
<b>Net Cash inflow/(Outflow) from Investing Activities</b>	<b>(2,060,526)</b>	<b>(2,066,714)</b>	<b>2,188,260</b>	<b>2,106,933</b>
<b>Net Increase/(Decrease) in Cash Held</b>	<b>(1,441,939)</b>	<b>(1,265,168)</b>	<b>2,461,391</b>	<b>2,417,027</b>
Opening Bank:	<u>2,902,686</u>	<u>3,233,565</u>	<u>441,334</u>	<u>860,536</u>
Closing Bank:	<u>1,460,746</u>	<u>1,968,397</u>	<u>2,902,825</u>	<u>3,265,563</u>
<b>Bank Consists of:</b>				
Bank of New Zealand Cheque Account	950,725	380,729	973,554	973,554
Bank of New Zealand Current Account	12,794	12,794	135	135
Kiwibank - Current Account	158,025	158,025	916,990	905,990
Kiwibank Call Account	805,869	605,669	800,511	380,511
National Bank Current Account	403,529	403,529	722,495	722,485
Regional Bank Accounts	-	439,663	-	380,680
<b>Total Cash at Bank</b>	<u>1,460,746</u>	<u>1,968,397</u>	<u>2,902,825</u>	<u>3,265,563</u>

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2017.

### 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, rounded to the nearest dollar.

#### 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, and Trade Creditors 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 PBE IPSAS 25, 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 2017

### 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 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 revenue transactions are exchange unless otherwise stated.

# New Zealand Post Primary Teachers' Association (Incl)

## Notes to the Financial Statements

For the year ended 31 March 2017

### l) Impairment

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

There have been no changes in Accounting Policies in the 2017 financial year.

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

### Notes to the Financial Statements

For the year ended 31 March 2017

	2017	2016
<b>2. Cash at Bank</b>		
Bank of New Zealand Cheque Account	280,729	873,654
Bank of New Zealand Current Account	12,794	135
KiwiBank Current Account	158,025	905,990
KiwiBank Call Accounts	1,009,198	300,511
National Bank Current Account	-	722,495
<b>Total Cash at Bank at National Office</b>	<b>1,460,746</b>	<b>2,903,685</b>
Cash at Bank held by Regions	429,653	380,880
<b>Total Cash at Bank</b>	<b>1,890,399</b>	<b>3,284,565</b>

<b>3. Accounts Receivable</b>		
Balances outstanding	71,415	40,997
Provision for doubtful debts	(21,498)	(21,498)
<b>Total Accounts Receivable by National Office</b>	<b>49,917</b>	<b>19,499</b>
Accounts Receivable by Regions	32,378	37,922
<b>Total Accounts Receivable</b>	<b>82,295</b>	<b>57,421</b>

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

<b>4. Employee Creditors</b>		
Annual Leave	371,348	422,522
Long Service Leave	327,021	361,379
Retirement Leave Accrual	455,155	481,593
Other Employee benefits and accruals	128,141	57,417
	<b>1,281,665</b>	<b>1,322,911</b>

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

Employee Creditors are disclosed as follows:

Current Liability	731,311	757,819
Non-Current Liability	550,427	565,092
	<b>1,281,658</b>	<b>1,322,911</b>

	2017 National Office	2017 NZPPTA	2016 National Office	2016 NZPPTA
<b>5. Income Tax</b>				
Recognised in the Income Statement				
Surplus (deficit) for the year	554,834	831,725	528,185	553,311
Tax at 28%	155,298	176,883	147,892	154,927
Permanent and Timing Differences	142,020	126,793	99,439	89,292
<b>Income Tax Expense</b>	<b>43,278</b>	<b>50,040</b>	<b>58,453</b>	<b>65,635</b>

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

Current Income Tax Payable/(Receivable)

Opening Balance	1,441	1,441	(4,185)	(4,186)
Use of Money Interest	(187)	(187)	-	-
Refunds Received	-	-	-	-
Tax adjustments	1,687	1,687	1,720	1,720
Current Taxation	41,586	46,403	56,733	63,915
Prior Year Final Tax Instalment	-	-	-	-
Current Year Tax Paid	(19,483)	(19,463)	(6,393)	(6,392)
Resident Withholding Tax Paid	(31,125)	(37,942)	(46,431)	(63,616)
	<b>(6,081)</b>	<b>(6,051)</b>	<b>1,441</b>	<b>1,441</b>

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2017

### 6. Property, Plant & Equipment

	Cost	Accumulated Depreciation	2017 Book Value	2017 Depreciation
Buildings - Willis Street Premises	365,915	146,562	237,353	13,660
Buildings - President's Apartment	1,072,076	1,003,449	68,627	50,409
Computers	354,149	353,849	10,300	4,527
Office Equipment	296,278	244,999	61,279	7,390
Furniture & Fittings	32,377	21,225	11,152	977
Furniture & Fittings - President's Apartment	178,925	0	178,925	0
Total National Office	2,327,721	1,770,077	557,644	76,963
Regional Offices - Total	104,404	98,210	6,194	359
Total NZPPTA	2,432,125	1,868,287	563,838	77,336

	Cost	Accumulated Depreciation	2016 Book Value	2016 Depreciation
Buildings - Willis Street Premises	2,260,000	673,662	1,586,338	67,600
Buildings - President's Apartment	381,335	132,682	248,753	13,971
Computers	1,069,899	1,033,068	36,831	49,162
Office Equipment	463,198	395,839	7,359	7,225
Furniture & Fittings	284,389	259,848	14,541	7,919
Furniture & Fittings - President's Apartment	32,377	21,225	11,152	751
Total National Office	4,431,198	2,523,224	1,904,974	146,828
Regional Offices - Total	104,404	97,654	6,750	355
Total NZPPTA	4,535,602	2,620,878	1,911,724	147,183

### Reconciliation of Net Book Value

Net Book Value at 1 April 2016	1,911,724
Plus Additions	323,611
Less Disposals	(167,090)
Less Depreciation	(145,339)
Plus Depreciation Written back on Disposals	159,470
Net Book Value 31 March 2017	2,082,375

### President's Apartment

In the 2016 financial 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 \$260,000. The building has a depreciated book value of \$237,353. This compares to recent sales of equivalent apartments at 6 Church Street of \$250,000 where the weathertightness 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

	2017	2016
Term Deposits	4,801,912	2,880,103
National Office	4,801,912	2,880,103
Regions	693,298	692,468
Total NZPPTA	5,500,210	3,572,571

Investments are disclosed as follows:-

	2017 National Office	2017 NZPPTA	2016 National Office	2016 NZPPTA
Current	4,201,912	4,900,210	2,500,000	3,322,468
Non-Current	600,000	600,000	250,103	250,103
	4,801,912	5,500,210	2,880,103	3,572,571

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 15 months.

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2017

Operating Leases	2017	2016
The association has the following operating lease commitments:		
Within one year:	210,562	242,554
One to two years	144,985	141,879
Two to five years	101,727	124,497
Over 5 years	-	-
	<u>457,274</u>	<u>508,930</u>

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

### 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, and the Bank of New Zealand. 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 2017 (2016: nil).

### 11 Capital Commitments

There are no known capital commitments as at 31 March 2017 (2016: nil).

### 12 Key Management Personnel

	2017	2016
Full Time Equivalents		
Executive	2.55	2.55
Management Staff	3.28	3.00
Total Remuneration	\$ 432,576	\$ 672,550

### 13 Retrospective Restatement of Error

During the year NZPPTA became aware that some payroll expenses had been treated as a liability in error. The 2016 comparative figures were corrected by a total of \$65,626 as shown below.

	2016	2016	2016	2016
	National Office Restated	National Office	NZPPTA Restated	NZPPTA
<b>Expenditure</b>				
Administrative & Finance	1,438,306	1,422,691	1,439,729	1,424,114
General Secretariat	1,498,334	1,490,554	1,499,503	1,494,723
Māori Activities	389,629	384,446	389,629	384,446
Membership Services	3,659,443	3,638,019	3,659,443	3,638,019
Policy & Advocacy	2,177,922	2,159,298	2,177,922	2,159,298
Depreciation	146,828	146,828	147,383	147,383
	<u>9,307,462</u>	<u>9,241,836</u>	<u>9,313,609</u>	<u>9,247,983</u>

The Opening balances in the Consolidated Statement of Changes in Equity were reduced by \$30,081 to reflect the effect of the error in years prior to 2016.

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2017

### 11 Financial Instruments Classification

#### National Office

			2017	2016
	Loans and Receivables	Liabilities at Amortised Cost	Total Carrying Amount	Total Carrying Amount
<b>Assets</b>				
Cash and Cash Equivalents	1,460,746	-	1,460,746	2,902,668
Investments	4,201,912	-	4,201,912	2,630,000
Trade and Other Receivables	229,758	-	277,011	216,036
<b>Total Current Assets</b>	<b>5,892,414</b>	<b>-</b>	<b>5,839,669</b>	<b>5,750,724</b>
Other Investments	600,000	-	600,000	250,103
<b>Total Non-Current Assets</b>	<b>600,000</b>	<b>-</b>	<b>600,000</b>	<b>250,103</b>
<b>Total Assets</b>	<b>6,492,414</b>	<b>-</b>	<b>6,539,669</b>	<b>6,000,827</b>

#### Liabilities

Trade and Other Payables	-	533,265	533,265	346,630
<b>Total Current Liabilities</b>	<b>-</b>	<b>533,265</b>	<b>533,265</b>	<b>346,630</b>
Long Term Other Payables	-	-	-	-
<b>Total Liabilities</b>	<b>-</b>	<b>533,265</b>	<b>533,265</b>	<b>346,630</b>

#### NZPPTA

			2017	2016
	Loans and Receivables	Liabilities at Amortised Cost	Total Carrying Amount	Total Carrying Amount
<b>Assets</b>				
Cash and Cash Equivalents	1,841,628	-	1,841,628	3,284,660
Investments	4,894,390	-	4,894,390	3,322,468
Trade and Other Receivables	262,134	-	271,927	255,960
<b>Total Current Assets</b>	<b>6,998,140</b>	<b>-</b>	<b>7,007,943</b>	<b>6,864,993</b>
Other Investments	600,000	-	600,000	250,103
<b>Total Assets</b>	<b>7,598,140</b>	<b>-</b>	<b>7,607,943</b>	<b>7,112,096</b>

#### Liabilities

Trade and Other Payables	-	574,211	585,989	399,325
<b>Total Current Liabilities</b>	<b>-</b>	<b>574,211</b>	<b>585,989</b>	<b>399,325</b>
Long Term Other Payables	-	-	-	-
<b>Total Liabilities</b>	<b>-</b>	<b>574,211</b>	<b>585,989</b>	<b>399,325</b>

### 12 Subsequent Events

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



# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2017

### 16 Detailed Schedule of Expenses

National Office 2016	NZPPTA 2016		National Office 2017	Budget 2017	NZPPTA 2017
<b>ADMINISTRATION EXPENSES</b>					
89,756	89,756	Building Expenses	105,605	109,000	105,605
352,872	352,872	General Expenses	323,062	354,700	323,062
117,617	117,617	Information Technology	123,070	115,000	123,070
740,625	740,625	Staff Costs	757,689	806,392	757,689
107,459	107,459	Superannuation	116,004	10,000	116,004
20,975	20,975	Audit Fees-National Office Auditors	24,490	24,000	24,503
41,562	41,562	Education payroll Commission	48,427	47,787	48,427
-	1,423	Audit Fees-Other firms	-	-	-
<b>1,479,358</b>	<b>1,481,291</b>	<b>TOTAL ADMINISTRATION EXPENSES</b>	<b>1,498,727</b>	<b>1,468,679</b>	<b>1,499,040</b>
<b>GENERAL SECRETARIAT</b>					
157,406	157,406	Annual Conference	165,652	167,500	165,652
186,811	186,811	Executive Expenses	181,100	180,500	181,100
101,850	101,849	General Expenses	73,391	101,200	73,391
201,782	201,782	President's Expenses	252,544	316,700	252,543
-	-	Special Groups	-	3,500	-
344,752	344,822	Regional Expenses	341,766	366,200	299,746
275,366	275,358	Staff Costs	259,363	246,400	264,863
19,483	19,483	Superannuation	18,765	24,000	18,765
-	-	Waikato & Kawarua	182	3,000	182
205,892	205,892	External Relations	192,834	236,000	192,834
-	-	Special Projects	-	500	-
<b>1,495,334</b>	<b>1,499,503</b>	<b>TOTAL GENERAL SECRETARIAT</b>	<b>1,491,090</b>	<b>1,651,500</b>	<b>1,439,078</b>
<b>MAORI ACTIVITIES</b>					
46,311	46,311	Te Huiarau Hui	31,802	45,000	31,802
35	35	Te Huiarau Conferences	150	5,000	154
7,184	7,184	Te Rep & Rohe	7,122	10,000	7,122
67,075	67,075	Maori Teachers' Conference	61,947	96,000	61,947
6,987	6,987	Maori Teachers' Conference Meet	6,580	8,000	6,580
4,965	4,965	Whaea & Kaumalus	7,864	4,500	7,864
6,350	6,350	Maori Contributions to Key WOP	6,313	10,000	6,313
5,691	5,691	Kapa Haka	12,865	5,000	12,865
69	69	Conference Calls	43	800	33
33,407	33,407	Mpa Manu Korero	36,047	34,500	36,047
184,710	184,710	Staff Costs	175,281	170,200	175,281
25,249	25,249	Superannuation	25,291	23,000	25,291
1,666	1,666	General Expenses	7,624	5,000	7,624
<b>389,828</b>	<b>389,629</b>	<b>TOTAL MAORI ACTIVITIES</b>	<b>378,753</b>	<b>425,900</b>	<b>378,753</b>
<b>MEMBERSHIP</b>					
191,238	191,258	General Expenses	189,293	203,000	189,293
76,580	76,580	Members Legal Representation	143,660	100,000	141,880
2,422,819	2,422,819	Staff Costs	2,312,363	2,461,000	2,312,363
261,463	261,463	Superannuation	277,130	270,000	277,130
248,518	248,518	Training Activities	465,778	227,000	365,776
176,722	176,722	Auckland Field Office	182,664	156,500	182,664
72,821	72,821	Christchurch Field Office	73,768	78,000	73,769
27,182	27,182	Dunedin Field Office	31,136	30,600	31,136
125,760	125,760	Hamilton Field Office	131,759	93,800	131,759
116,319	116,319	Palmerston North Field Office	129,047	123,000	129,847
<b>3,719,402</b>	<b>3,719,402</b>	<b>TOTAL MEMBERSHIP EXPENSES</b>	<b>3,834,687</b>	<b>3,742,800</b>	<b>3,834,587</b>

# New Zealand Post Primary Teachers' Association (Inc)

## Notes to the Financial Statements

For the year ended 31 March 2017

16 Detailed Schedule of Expenses (Continued)					
National Office	NZPPTA		National Office	Budget	NZPPTA
2016	2016		2017	2017	2017
<b>POLICY AND ADVOCACY</b>					
225,677	225,677	Association Activities	215,570	205,360	215,570
214,876	214,876	Collective Agreement	84,587	80,000	284,587
75,896	75,896	General Expenses	40,135	87,100	40,135
130,039	130,039	Information Services	180,695	173,000	180,695
42,134	42,134	Principals' Council	36,212	42,000	36,212
1,295,760	1,295,760	Staff Costs	1,318,341	1,289,500	1,318,341
193,540	193,540	Superannuation	188,718	175,000	183,718
<b>2,177,922</b>	<b>2,177,922</b>	<b>TOTAL POLICY &amp; ADVOCACY</b>	<b>3,259,066</b>	<b>2,167,950</b>	<b>3,259,066</b>
<b>OTHER</b>					
146,828	147,383	Depreciation Expense	144,087	190,000	144,811
-	-	Mahi Tika	-	5,000	-
-	-	Surplus Staffing Reserve	-	30,000	-
<b>146,828</b>	<b>147,383</b>		<b>144,087</b>	<b>225,000</b>	<b>144,811</b>
<b>3,408,983</b>	<b>3,415,130</b>	<b>TOTAL EXPENDITURE</b>	<b>3,606,318</b>	<b>3,679,129</b>	<b>3,555,166</b>
17 Lease Expenses					
The following lease expenses are included in the in the expenditure categories above:					
1,794	1,794	Equipment Leases	1,794	2,500	1,794
127,982	131,982	Office Rental	238,982	186,500	238,982
127,074	127,074	Motor Vehicle Leases	113,606	127,000	113,606
-	-	Printer Leases	3,032	-	3,032
<b>260,850</b>	<b>260,850</b>		<b>358,384</b>	<b>285,000</b>	<b>358,384</b>

### 18 Benefit Payments to Staff

During the year \$620,906 was paid in contribution to superannuation (various to AUI) (2016 \$607,194)

### 19 Finance Leases

During the year NZPPTA entered into a finance lease for photocopiers used at its offices.

There is no contingent rent, renewal or purchase options, or financial restrictions imposed by this lease.

2017

Within one year	35,391
Within one to five years	142,532
Over 5 years	-
	<b>177,923</b>

### 20 Related Parties

The NZPPTA is related to the Workers Education Trust through being a member of its Board of Trustees. NZPPTA paid a one-off set up fee of \$15,000 to the Workers Education Trust.

The NZPPTA is related to the Education Benevolent Society through being a member of its Board of Trustees. NZPPTA received board attending fees of \$4,200 (\$5,600 2016) from Education Benevolent Society during the year.



BDO WELLINGTON

**INDEPENDENT AUDITOR'S REPORT  
TO THE MEMBERS OF THE NEW ZEALAND POST PRIMARY TEACHERS' ASSOCIATION**

**Opinion**

We have audited the financial statements of New Zealand Post Primary Teachers' Association ("the Association"), which comprise the statement of financial position as at 31 March 2017, and the statement of financial performance, statement of changes in equity and cash flow statement for the year then ended, and notes to the financial statements, including a summary of significant accounting policies.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Association as at 31 March 2017, and its financial performance and its cash flows for the year then ended in accordance with Public Benefit Entity Standards Reduced Disclosure Regime ("PBE Standards RDR") issued by the New Zealand Accounting Standards Board.

**Basis for Opinion**

We conducted our audit in accordance with International Standards on Auditing (New Zealand) ("ISAs (NZ)"). Our responsibilities under those standards are further described in the *Auditor's Responsibilities for the Audit of the Financial Statements* section of our report. We are independent of the Association in accordance with Professional and Ethical Standard 1 (Revised) *Code of Ethics for Assurance Practitioners* issued by the New Zealand Auditing and Assurance Standards Board, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Our firm carries out other assignments for the abbreviation in the area of taxation advice. In addition to this, partners and employees of our firm deal with the abbreviation on normal terms within the ordinary course of trading activities of the business of the abbreviation. The firm has no other relationship with, or interests in, the abbreviation.

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

The Executive Committee is responsible on behalf of the Association for the preparation and fair presentation of the financial statements in accordance with PBE Standards 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.

In preparing the financial statements, the Executive Committee is responsible on behalf of the Association for assessing the Association's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless the Executive Committee either intends to liquidate the Association or to cease operations, or has no realistic alternative but to do so.

**Auditor's Responsibilities for the Audit of the Financial Statements**

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an

auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with ISAs (NZ) will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with ISAs (NZ), we exercise professional judgement and maintain professional scepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit 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 Association's internal control.
- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of the use of the going concern basis of accounting by the Executive Committee and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Association's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Association to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with the Executive Committee regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

#### Who we Report to

This report is made solely to the Association's members, as a body. Our audit work has been undertaken so that we might state those matters which 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 Association and the Association's members, as a body, for our audit work, for this report or for the opinions we have formed.



BDO Wellington  
Wellington  
New Zealand  
7 August 2017