

Navigating Surplus Staffing – Part 1

Preparing our minds for the session

E te hui

For this gathering

**Whāia te mātauranga kia
mārama**

Seek knowledge for
understanding

Kia whai take ngā mahi katoa

Have purpose in all that you do

Tū māia, tū kaha

Stand tall, be strong

Aroha atu, aroha mai

Let us show respect

Tātou i a tātou katoa.

For each other.

Your presenters

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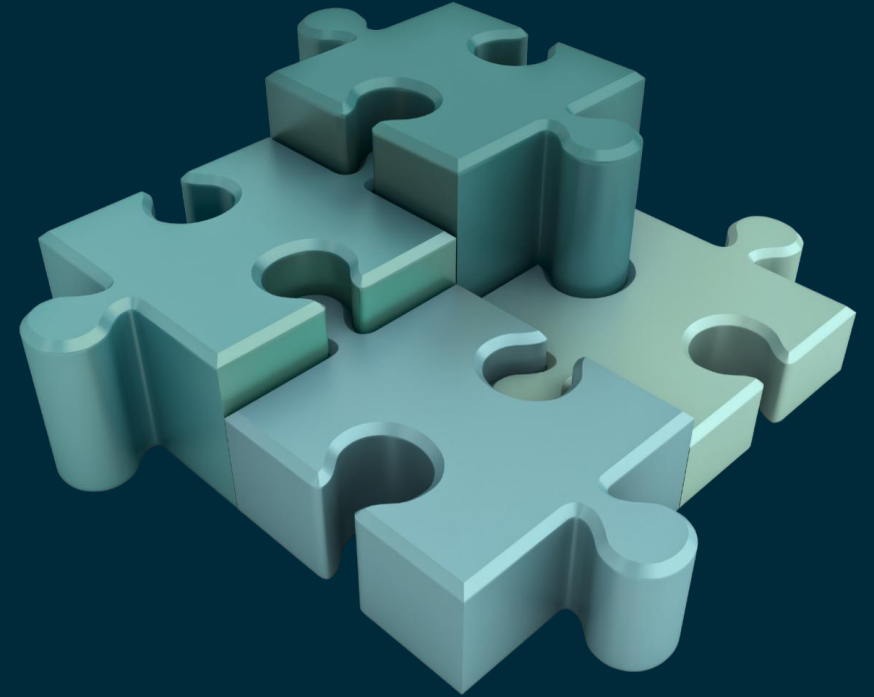
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What we'll cover

- Staffing entitlement and reviews
- Notification to the board
- Surplus staffing – first 4 steps
- CAPNA or Needs Analysis Reviews
- Consultation
- Q&A
- Next steps from here



Staffing entitlement notification cycle

The Ministry of Education issues staffing entitlement notices twice a year.

March

- Confirmed staffing entitlement notices (based on existing funding criteria and calculation models)

September

- Provisional staffing entitlement notices

More Info

www.education.govt.nz > Entitlement staffing



Before the notice arrives

- Ensure unit allocation policy and procedure are fit for purpose and clear
- Review your current fixed terms and identify when they are due to expire
- Take a cautious approach to appointments
- Do not delay performance management concerns – the Surplus Staffing process is **not** a remedy

Informing the board

- Ensure the board is aware of the staffing entitlement
- The board then determines if they will support the process or delegate it to the principal
- Record the agreed approach



Seeking a review of staffing entitlement

Questions to consider

- Do we need to apply for a review with the Ministry's Resourcing Unit?
- Did we miss or provide out-of-date information when supplying our figures for staffing? (*If yes, include this in the review*)
- Is there a strong business case, directly linked to the delivery of the curriculum, that could support a review?
- Have we informed the relevant union(s) of our reduced staffing entitlement and the possibility that we may need to enter into a surplus staffing process?

Surplus Staffing – Stage One

First 4 things to review and action

Attempt to resolve, mitigate, or reduce any predicted surplus through attrition and/or voluntary options:

1. Attrition (non-replacement of current vacancies)
2. Voluntary options
3. Fixed term employment agreements
4. Consultation requirements – these vary depending on the relevant Collective Agreement

Still a staffing surplus after completing the first four steps?

Consider a CAPNA (Curriculum and Pastoral Needs Assessment) or Needs Analysis Review.



Reviewing staffing - CAPNA or Needs Analysis

Things to consider

- CAPNA or Needs Analysis – what requirements must be met?
- Consultation obligations – who, how, and why?
- Timeframes – what must be done by when?
- Employment protection provisions – who do they apply to?
- Duty of care and pastoral support – what are our responsibilities to staff?

Collective Agreement Clauses

Primary

- Part 9: Employment Protection and Surplus Staffing Provisions
- Appendix 4: School Reorganisation Staff Surplus Provisions

Secondary

- Part Three: Terms of Employment, section 3.9 Surplus Staffing and merger provisions, clauses 3.9.1 to 3.9.9 (b)

Area

- Part Two: Terms of Employment, section 2.13 Surplus Staffing, clauses 2.13.1 to 2.13.5 (c) and 2.13A Employment Protection Provisions
- Appendix 5: Surplus Staffing Procedures

More Info

www.education.govt.nz > People and Employment

Kōrero



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Closing the session

Unuhia, unuhia

Draw on, draw on

Unuhia ki te uru tapu nui

Draw on the supreme sacredness

**Kia wātea, kia māmā,
te ngākau, te tinana,
te wairua i te ara tangata**

To clear, to free the heart, the
body, and the spirit of mankind

**Koia rā e Rongo,
whakairia ake ki runga**

Rongo, suspended high above us

Kia tina! Tina! Hui e! Tāiki e!

Draw together! Affirm!

Ngā mihi nui!
Thank you!