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Foreword

After the last bargaining round for the Secondary Teachers' Collective Agreement, all involved conceded that a better and more productive way of achieving agreement needed to be found.

A Ministerial Taskforce involving the Ministry of Education, the Post-Primary Teachers' Association, a principal nominee of the Minister and the NZ School Trustees Association have spent the past nine months working together to develop proposals for the future based on a shared understanding of the issues facing teachers and schools.

I am appreciative of the way the Taskforce participants worked together. They were positive and constructive, with all parties able to accommodate others' views in achieving the consensus reached by this report.

This report charts a clear sense of strategic direction for secondary teachers over the next decade and will guide the bargaining parties in achieving their shared key objectives.

I strongly urge the parties to now move forward and use this report as a basis to work together and establish effective processes that will create stability in the sector.

Finally, I wish to thank all those who have presented submissions, the schools who have made us welcome, respondents to the questionnaire and, particularly, the Taskforce members who worked so hard to produce this report.

Dame Margaret Bazley DNZM

Chairperson

Executive Summary

The Taskforce's objective was to develop recommendations ensuring a supply of high quality, appropriately qualified secondary teachers who will improve the learning outcomes of all students in state and integrated schools. To this end, the Taskforce has developed a remuneration strategy which takes into account the issues facing the secondary teaching profession over the next decade.

In its deliberations the Taskforce analysed the current remuneration system, including salary and the broader terms and conditions which comprise the remuneration package. The Taskforce considers that in order to recruit, retain and develop highly effective teachers now and in the future, there are five key areas of intervention. These are: the provision of pre-service training; recruitment, appointment and induction processes; professional development opportunities; appraisal against standards; and development of career pathways.

The Taskforce proposes that over time the sector move to a system of remuneration incentives related to ongoing professional learning. To achieve this the Taskforce proposes that the following recommendations be considered under a staged approach to an integrated remuneration strategy:

- That new career pathways, underpinned by improved professional development and teaching-focussed qualifications, be established;
- That postgraduate practice-based secondary teaching qualifications be developed on the basis of the principles established by the Taskforce;
- That a working group of stakeholders be established to develop a qualification remuneration model for consideration in the 2007 STCA negotiations once the postgraduate teaching qualification pathways are established, operating and assessed to be working;
- That an objective mechanism be determined to achieve security for teachers in their current remuneration, while a new system is explored and agreed;
- That the Government consider the role of units in the recruitment and retention of middle management;

- That the Government consider a provision in the STCA for medical retirement;
- That the Government consider extending a student loan abatement scheme to other target groups as the need arises;
- That the Government consider implementation of a paid sabbatical scheme when falling rolls begin to ease pressure on secondary teacher supply; and
- That a study be undertaken to consider how the work of a teacher, and particularly a middle manager, could be better structured, resourced and organised in order to support more effective classroom teaching. This will include a review of best practices of schools, consideration of the provision of additional non-contact time to middle managers, and the utilisation of ancillary support.

The Taskforce believes that these recommendations will address recruitment and retention concerns and support and encourage secondary teachers to develop their professional practice to ensure the continued delivery of quality outcomes for all students.

Context for this report

New Zealand secondary school education occurs within a global environment of social, cultural, economic and technological change. New Zealand is becoming an increasingly knowledge-based economy. As the pace of change accelerates, the education sector must be supported as it continues to adapt. This will help students to acquire the skills and knowledge they need to lead fulfilled lives, contributing to the economy and to our broader society.

Key environmental changes for New Zealand are:

- The population is becoming increasingly diverse;
- The Māori and Pacific populations are growing at a faster rate than the total population;
- The average age of the workforce is increasing;
- Goods, services, people, capital and information are highly mobile in an increasingly interconnected global economy;
- Rapid advances in technology, including how we manage and communicate information, will continue to bring new opportunities and challenges;
- A knowledge-based economy depends increasingly for its success on a skilled workforce;
- Workers need to stay engaged in lifelong learning because shifts in skills and learning are needed;
- Projected falls in European and North American labour forces mean more international employment opportunities for New Zealanders; and
- Employers are increasingly in global competition for the recruitment and retention of skilled workers, including secondary teachers.

Within this changing environment, secondary teachers need to be supported in new ways to ensure the continued delivery of quality education.

NZ Secondary Teaching as a Profession

Secondary schools are complex organisations facing considerable pressures to respond to changing demands. Developments in the economy and society impact on the work of teachers and the needs of students and schools now. This will continue in the future.

The Government is largely responsible for establishing and maintaining a supportive infrastructure within which teachers, educational leaders and Boards of Trustees can focus on ensuring that students learn and that families and whanau can support this learning. At the same time size, location, local community characteristics and competition also shape the focus of individual schools.

The work of secondary teachers in New Zealand is influenced by several factors, including:

- The diversity of the student population;
- Curricula and assessment for qualifications;
- Community expectations of secondary schools;
- Demographics and teacher supply dynamics;
- The industrial climate.

Diversity of Student population

Changes in the nature of the secondary school population include:

- increasing proportions of Māori and Pasifika students¹;
- increasing numbers of Māori-medium students and kura kaupapa Māori enrolments;
- increasing numbers of migrant and immigrant students²;
- more students for whom English is not their first language;
- more international (fee paying) students;
- greater degrees of mainstreaming of special needs students;
- more students studying a broader range of school subjects;
- increased retention rates into the senior school³;
- a period of roll growth, expected to peak in 2006; and
- increased numbers of “at risk” students⁴.

These trends point to the need for schools and teachers to be able to work effectively with an increasingly diverse range of students and to offer a broader range of learning pathways. In particular, improving outcomes for Māori and Pasifika⁵ is becoming progressively more important for the maintenance of the nation's social and economic well being

Many of the fundamentals of our secondary education system are sound. Internationally we are performing well across a number of important education measures⁶. However, there are worrying disparities in achievement in terms of literacies, participation in school, and attainment of qualifications⁷. The '*Quality Teaching for Diverse Students in Schooling: Best Evidence Synthesis*'⁸ highlights this challenge and provides an evidence base on which to build future policy initiatives.

These disparities present significant challenges to the secondary education sector and require a continued and enhanced focus on developing effective teaching practices. There are implications for priorities in resource allocation if these challenges are to be successfully met.

Much of the variation in student achievement is related to the wider socio-economic divisions in society⁹. However, there is some evidence of improvement in literacy and numeracy from targeted interventions in low decile schools¹⁰. All teachers need to gain and develop tools to ensure their continued ability to work effectively with diverse student groups. Again there are implications for priorities in resource allocation.

Curricula and assessment for qualifications

Historically, senior secondary schooling and school qualifications were designed mainly for those going to university. During the last 30 years the pace of social and economic change has increased dramatically. More students now remain at school until the age of 18, seeking a much wider range of courses and qualifications. There have been significant changes in the curriculum and assessment of learning, including:

- The introduction of a new national curriculum^{11 12};
- Assessment changes including use of NQF Unit Standards and the introduction of the NCEA¹³ and related Achievement Standards;

- The development of non-traditional courses for the increased numbers and diversity of senior students¹⁴; and
- A change from a core focus on students acquiring bodies of knowledge in a range of discrete disciplines to a greater emphasis on authentic learning (knowledge and skills acquired and applied in contexts including interdisciplinary contexts)¹⁵.

In conjunction with these changes, rapid advances in technologies are creating new demands on our education system in terms of the skills our students need. These technologies create many opportunities for teaching and learning. It is important to ensure that all students and teachers have access to, are supported in, and can adapt to using new technologies¹⁶. Both the Government and schools are aware of the challenges faced in funding Information and Communication Technologies (ICT)¹⁷.

Community expectations of secondary schools

School communities recognise the critical role that effective teachers play in educating their children. In the past they have proved to be highly supportive of “their teachers” and the need to ensure that they are respected as professionals, well rewarded for their efforts, and are supported.

The *Tomorrow Schools* reforms of 1989 placed the governance of schools in the hands of the parent community. This led to greater local accountability and heightened community awareness and expectation of local schools. As a result school communities have developed a greater sense of ownership of their school. Coupled with this is a growing expectation that schools will provide students with the high quality education necessary to enable students to succeed in the 21st century.

Parents have ever higher expectations of quality performance from teachers. They look to teachers to maximise the education achievement of their children, thus providing these children with the skills and knowledge they require for an increasingly competitive job market.

To meet these community expectations and to cater for the increasing diversity of their student populations, many schools have extended the range of courses and extracurricular activities they offer in order to retain students. This impacts on the workload of teachers.

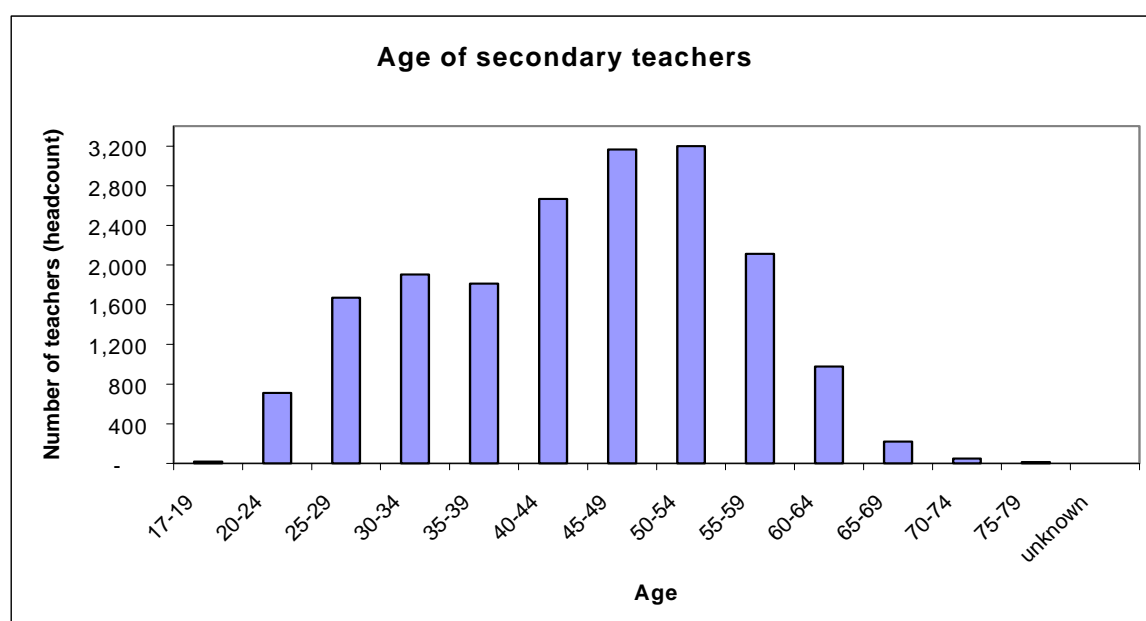
Demographics and Teacher Supply Dynamics

Teacher Demographics

There are approximately 18,300¹⁸ secondary teachers in New Zealand state and integrated schools.

Some key demographic features of the secondary teaching force are:

- The median age of a secondary teacher is 46¹⁹;

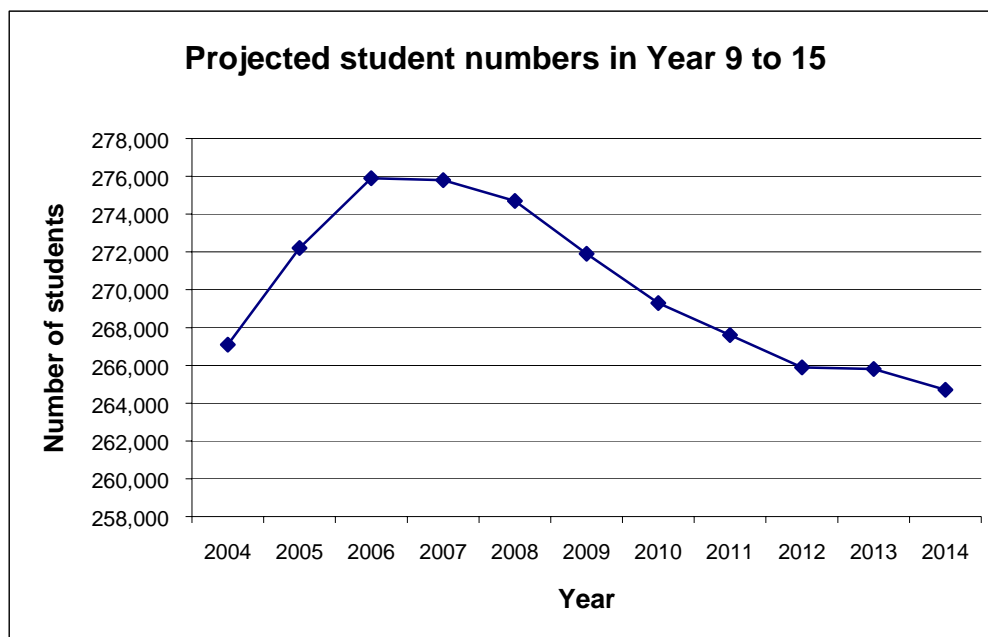


- 57%²⁰ are female;
- Approximately 10,300²¹ secondary teachers hold a bachelors degree or higher;
- There are approximately 8,500²² secondary teachers on the top step of the salary scale;
- and
- The average salary of a secondary teacher is \$57,600²³.

Secondary Teacher Demand

Changes in demand for secondary teachers are largely influenced by fluctuations in:

- Base student numbers - secondary student rolls are expected to continue to rise (particularly in Auckland), peaking in 2006;



- Foreign-fee paying students²⁴ – creating particular demand for teachers of senior mathematics and individual sciences;
- Migration - there is currently a net inflow of school age children into New Zealand, contributing to both demand for teachers and increasing student diversity;
- Government policies – for example the implementation of the Staffing Review Group recommendations²⁵;
- Local staffing decisions - Boards often fund above-entitlement positions in response to curriculum, pastoral and management needs; and
- Changes in the student profile – particularly changes in Maori and Pasifika proportions of total enrolments highlight the need to more closely align the teacher work force profile. This is a specific demand within the overall demand for secondary teachers.

Teacher Supply

Secondary teachers are drawn largely from the graduate and professional workforce. They have qualifications that enable them to select alternative occupations. There is increased global competition for secondary teachers, especially in the western world, and New Zealand secondary teachers are highly regarded overseas.

Sources of teacher supply are:

- **Retention of current teachers** - The retention of current teachers varies from year to year²⁶, and is affected by a variety of factors²⁷. Not all parts of the secondary workforce demonstrate the same level of retention. For example, teachers in management positions are less likely to leave the profession than classroom teachers without management units²⁸; and retention rates tend to be lowest for teachers in the 24-34 and 60+ age groups²⁹;
- **Teacher graduates**³⁰;
- **Returning teachers** – of any cohort of departing teachers, over a third have returned to teaching after one year's absence, and over half have returned after seven years,³¹;
- **New Zealand teachers returning from overseas** - the majority of these teachers are returning from the UK³²; and
- **Overseas teachers** – the number³³ of overseas teachers in secondary schools has been increasing, particularly in low decile schools in the Auckland region. Many overseas teachers are employed to teach mathematics and science, particularly physics.

The Industrial Climate

In New Zealand the maximum term for collective agreements is three years. In practice, secondary teacher collective agreements have a term of around two years. Traditionally, negotiations have been difficult. In particular the last three negotiations have each taken in excess of twelve months to complete and have involved industrial disruption³⁴.

Secondary teacher pay rates are currently negotiated within a Government policy of a unified pay scale. This means that pay rates negotiated by secondary teachers offered to primary teachers through the entrenchment clause of the Primary Teachers' Collective Agreement.

Current Remuneration System

Secondary teachers are remunerated through a number of salary and non-salary components.

Collective Agreement Provisions

Salary and Allowances

- **Base scale salary** – based upon qualifications, work experience and length of teaching service³⁵.
- **Units** – additional salary payments allocated to teachers by the Principal, in consultation with staff, usually for undertaking specific additional responsibilities³⁶.

- **Targeted allowances**

The main targeted allowances are:

- The High Priority Teacher Supply Allowance³⁷;
- The Staffing Incentive Allowance³⁸;
- The Māori Teacher Immersion Allowance³⁹;
- The RTLB Allowance⁴⁰; and
- The Service Increment⁴¹.

- **Specific duty allowances**

- Careers Adviser Allowance⁴²;
- Higher Duties Allowance⁴³;
- Associate Teacher Allowance⁴⁴;
- Sixth Form Certificate Allowance⁴⁵;
- Bus Controllers Allowance⁴⁶; and
- Field Allowance⁴⁷.

Non-salary remuneration

- Other Collective Agreement provisions which form part of the overall remuneration package for teachers⁴⁸ include:
 - Sick leave provisions
 - Parental leave provisions
 - Study awards (75 per year)
 - Leave with pay provisions
 - Refreshment leave without pay (which is counted as service for some purposes)
 - Surplus staffing provisions for teachers who lose their positions as a consequence of falling rolls or school reorganisation.

Hours of work

The Collective Agreement also makes provision for time allowances for specific purposes:

- Entitlement to timetabled non-contact time for duties other than classroom teaching⁴⁹;
- Beginning teacher time allowance for advice and guidance purposes for induction and professional development of beginning teachers⁵⁰; and
- Te Atakura time allowance to undertake pastoral work, support, and liaison duties with Māori students and the community⁵¹.

Schools are closed for instruction for approximately 12 weeks a year. During this time there are five call-back days per year for professional development and five for other purposes. Other than for the call-back days teachers are not required to attend the school when it is not open for instruction, though many teachers continue to spend part of this time working.

Provisions outside the Collective Agreement

Current provisions which exist outside the STCA include:

- **3R payments** – (Recruitment, retention and responsibility payments) Board-funded payments to individuals for recruitment, retention or additional responsibility⁵²;
- secondary teacher **supply initiatives**⁵³ - there is a range of ongoing teacher supply policies. The purpose of these is to increase recruitment into secondary and Māori-medium teaching, to increase the supply of Māori and Pasifika teachers, and to increase the supply of teachers for subjects and locations identified as particularly difficult to staff; and
- **Government Superannuation Fund** which teachers had access to until 1992. There are approximately 2,100 secondary teachers who are still members.

Initiatives to take effect from 2004 include:

- A wider state sector **retirement savings** scheme to take effect from 1 July 2004, which secondary teachers will be able to access; and
- A **student loan abatement** scheme for new secondary teachers in areas and subjects where recruitment and retention has been identified as particularly difficult.

Analysis of the current remuneration system

Collective Agreement Provisions

Salary Structure

Base salary and allowances

The remuneration system in New Zealand is broadly similar to those of other OECD countries in its structure. It is dissimilar to these countries in that the base scale is comparatively short (salary scales average 25 steps in the OECD compared to eight⁵⁴ in New Zealand) and that the OECD salary rates (adjusted for purchasing power parity) are generally higher⁵⁵. New Zealand is, however, one of the few OECD countries where inflation-adjusted teacher salaries have risen in recent years and salary rates are generally higher relative to Gross Domestic Product⁵⁶.

The purposes for which allowances are paid in New Zealand are broadly similar to most OECD countries. Many countries in the OECD include additional payments for extracurricular activity and for overtime or extra classes.

Entry-level salaries for teachers appear competitive within the New Zealand employment market. However, there is a limited ability to achieve ongoing salary increases. Once teachers reach the top of the base salary scale they depend either on accepting management or curriculum responsibility and gaining units or on negotiated increases to the top step of the salary scale to improve their salary. Except for the service increment, there is no direct salary incentive to improve qualifications⁵⁷.

A characteristic of the salary distribution of teachers is the narrowness of the salary bands. A high proportion of secondary teachers are at the top step of the salary scale. This is partly due to the compressed nature of the scale and partly due to the age profile of the profession.

Secondary teachers have traditionally rejected any idea of performance pay based on differential salary changes linked to subjective judgements of differences in performance⁵⁸. However, all secondary teachers must annually demonstrate both competency and ongoing professional development against a set of professional standards for the purposes of registration⁵⁹ and attestation for annual salary increments. Secondary teachers gain recognition for performance through promotion, peer acknowledgement and professional satisfaction.

Units

The introduction of the unit system in 1996 replaced a system in which schools were allocated a fixed numbers of designated positions, paid at specified rates above the classroom teacher scale. Of the 19,000 units created, most were used to translate existing positions from the “rate for the job” to the “base scale plus unit” regime. Approximately 3,000 ‘free’ units remained. Some of these went to those already in positions above the base scale and the remainder provided some flexibility for schools to allocate units to teachers who previously did not have access to rates beyond the base scale.

In recent years the unit system has increasingly allowed schools to provide salary above the basic scale to teachers other than those in designated positions. The degree to which units feed into recruitment and retention is unclear.

Issues around units have been identified as follows:

- the awarding of units may not be sufficiently closely aligned to performance to send strong signals to the most able teachers;
- the rate paid for the units is considered by teachers to be insufficient for the purposes for which they are used;
- units are generally awarded for specific tasks on top of teaching workloads;
- units do not come with an assured time allowance in order to do these tasks;
- ultimately, the use of units is constrained by the allocation of the number of units to the school; and

- potential entrants to the profession may not take account of units in assessing potential future salary.

Recognition of Qualifications

Currently the remuneration system recognises qualifications at entry. Once teachers reach the top of the base scale, qualifications have no additional impact on teacher remuneration (other than for those who hold the Service Increment). Higher or additional qualifications are, however, indirectly recognised through increased promotional opportunities.

Non-salary remuneration

There are a number of broader terms and conditions that are marked either by their presence or their absence from the current remuneration system:

Non-contact time

Non-contact time allows teachers to undertake essential non-teaching duties, professional interactions, and planning and preparation for classroom teaching. It is considered an important factor in ensuring the quality delivery of education to students. Current non-contact provisions will assist classroom teachers in managing their workload and are anticipated to aid in retention.

Refreshment Leave

The refreshment leave provisions of the STCA offer a form of unpaid sabbatical leave. Teachers who are eligible and meet the criteria may arrange with the Board to take such leave and have this time recognised as service.

Other provisions

The current New Zealand remuneration system gives no contractual entitlement to secondary teachers for exit provisions⁶⁰ or employer contributions to retirement savings⁶¹, paid sabbatical leave, or home loan assistance, as exist in some other countries.

Provisions Outside the Collective Agreement

3R Payments

Boards of trustees have the discretion to pay their teachers additional remuneration by the way of 3R payments should their resources and their financial priorities permit.

Teacher Supply Initiatives

The Taskforce agrees with retaining the current use of scholarships to attract graduates into teaching and the use of allowances to attract teachers to difficult to staff situations as mechanisms for retaining responsiveness and flexibility to changes in the labour market.

The Government recently introduced a contribution to student loan scheme repayments for new teachers in areas and subjects where recruitment and retention has been identified as particularly difficult⁶². These payments will be available from 2004.

The Government also recently announced a wider state sector retirement savings scheme, to take effect from 1 July 2004, which secondary teachers will be able to access.

Career Structure

Currently the career structure for secondary teaching is relatively inflexible. Those wishing to advance beyond the top of the basic scale are normally required to take on management responsibilities. This can mean that students lose access to the skills of some of our best classroom practitioners if those teachers seek higher rates of remuneration and responsibility by going into management and senior management roles.

There is a growing reluctance of teachers to take on management roles. This has led to a shortage of suitably qualified teachers applying for such positions. Typically the reason cited for not applying is that the requirements of the job have grown to the point where they

seem unmanageable. As workload increases, there is no corresponding reduction in ancillary functions which are unrelated to the professional role. This suggests that there are issues around the relative remuneration and/or the “do-ability” of the job.

In addition, except through promotion to management and administration positions (or the issuing of salary units to individuals), the present career structure does not provide opportunities for teachers to develop specific interests, skills and talents as classroom teachers, nor does it recognise this development as it occurs.

Looking forward

Introduction

New Zealand and international research indicates that a number of powerful factors influence student outcomes, including:

- socio-economic background;
- employment status of parents;
- level of parent education;
- home situation;
- individual student ability;
- student health;
- level of teacher training;
- class size;
- resourcing levels;
- level of teachers' specialist qualifications;
- student self image;
- teacher effectiveness; and
- school programmes and curricula.

Schools and teachers have the potential to affect a number, but not all, of these factors. Effective teaching is a key component in improving outcomes for all young people. To maximise this potential, teachers must be supported by effective resourcing, particularly if there is a goal of systematic improvement in teacher qualifications as a mechanism for improving educational outcomes for students.

Differences in the social capital that students bring to school affect what and how they are taught in schools, as well as how readily they respond to a range of teaching strategies. These differences fuel public perceptions of the quality of schools. Despite such differences, appropriately supported and well resourced strategies for supporting teaching practice can underpin effective teaching and positive outcomes in all settings.

Professional Growth

Against the backgrounds of changes identified earlier in this report, secondary teachers now and in the future⁶³ will need:

- a passion for learning and an enjoyment of working with young people.
- a commitment to lifelong learning;
- in-depth subject content knowledge and skills;
- a solid base of subject pedagogy;
- an enhanced ability to work effectively with diverse learners to raise achievement of all students;
- an ability to see themselves as members of a professional community, generating and using knowledge about effective practice;
- an ability to connect their specialism(s) with those of others, inside and outside the school setting;
- an ability to make effective links with other learning institutions and organisations to access expertise in support of student learning; and
- an awareness of trends and patterns of change - locally, nationally, globally - such as the current increased role of technology.

The Taskforce is of the view that to recruit, retain and develop such teachers, there are five key areas of intervention. These are:

- provision of pre-service training;
- recruitment, appointment and induction processes;
- professional development opportunities;
- appraisal against professional standards; and
- the development of career pathways.

Pre-service training

Pre-service training must focus on:

- subject-specific pedagogical knowledge and skill;
- professional practice;
- critical reflection;
- management of student behaviour;
- curriculum knowledge;
- assessment, particularly for qualification;
- general learning theory; and
- professional ethics.

It must have:

- a strong national quality assurance;
- well-defined entry standards and selection processes; and
- well-defined graduation standards which are applied consistently, nation-wide.

Recruitment, appointment and induction

Schools should use effective appointment practices⁶⁴ and, for registration purposes, schools should rigorously apply the professional entry standards.

For beginning teachers there must be:

- effective recruitment and appointment processes;
- a quality induction programme (including education on how schools work); and
- ongoing support as they embark on their career.

Professional Development

The Taskforce believes that the overarching goal of the education system is for all students to leave school having succeeded to the best of their abilities. It also believes that:

- One factor critical to student success is the quality and effectiveness of teaching;

- In order to keep abreast of constant changes teachers will need to engage in readily available, adequately resourced, quality professional development⁶⁵;
- Such professional development should contribute ultimately to improving the learning outcomes of students;
- A culture of whole school improvement as well as individual engagement needs to be encouraged; and
- Professional development should be targeted to the specific needs of teachers and schools.

Appraisal against standards

The secondary teaching profession has a set of professional standards that teachers are required to meet annually. The Taskforce believes that:

- The use of professional standards can be useful for teachers in identifying areas where professional development would be beneficial; and useful to schools in providing guidance in prioritising their professional development resources; and
- Resources need to be prioritised to these ends.

Development of Career pathways

In order to allow teachers to focus on their strengths and to improve the ‘fit’ between the individual and the job, the Taskforce would like to see:

- the expansion of career paths available to secondary school teachers; and
- pathways that allow skilled teachers to remain as career classroom teachers, performing, for example, a mentor role for other teachers.

In increasing the range of professional pathways available in schools the Taskforce believes that the retention, morale and overall effectiveness of the profession will improve.

The Way Ahead

Introduction

The Taskforce considers that New Zealand needs a remuneration system (including salaries and supporting conditions) that both maintains a reasonable supply of appropriately trained and qualified secondary teachers, and supports and builds on the quality and effectiveness of the teaching force.

This change would allow recognition of the fact that school conditions are important to students as well. To achieve this, the Taskforce recommends that more attention be paid to the professional competencies, skills and related working conditions which are critical to raising student achievement. This means thinking about extending the range of the career pathways available to teachers and facilitating the professional development and lifelong learning which ensures the skills and knowledge appropriate to these positions can be enhanced across the sector. It also means ensuring working conditions which support and maximise teaching effectiveness.

The remuneration system plays important roles in:

- attracting and retaining teachers;
- signalling the value of the various career paths that can be followed by teachers; and
- recognising the value of the growing professional expertise of teachers as their career progresses.

While taking into account broader labour market conditions⁶⁶, the remuneration system must also reflect the specific characteristics and circumstances of the secondary teacher workforce⁶⁷ in order to be effective.

The Taskforce is of the view that a range of inter-related interventions is required and proposes that the recommendations in this report be considered under a staged approach to an integrated remuneration strategy.

Principles for a Remuneration Strategy

Currently, the base salary scale for New Zealand secondary teachers is short compared to other OECD countries. While entry-level salaries appear competitive within the New Zealand labour market, teachers at the top of the base salary scale must depend on moving into management or specialist positions, or on negotiated increases, to improve their salary. The service increment is the only direct salary incentive to improve qualifications.

The Taskforce proposes that over time the sector move to a system of remuneration incentives related to ongoing professional learning. The staged implementation of the recommendations in this report form the basis of a remuneration strategy. The Taskforce believes that the following principles would be reflected in the remuneration system once the recommendations in this report have been achieved:

- An increasingly qualified workforce;
- Enhanced recruitment and retention;
- A national qualification standard for entry to the secondary teaching profession;
- Ongoing professional development and recognition of ongoing learning;
- Career structures that reflect a broad range of career pathways;
- A remuneration system that recognises the desired characteristics;
- Equal access to the qualifications and career pathways for all secondary teachers;
- Established infrastructure underpinning the remuneration system, with well-designed qualifications and career pathways; and
- A settled industrial environment as a prerequisite.

Recommendations

The Taskforce recommends that:

- The Minister note that the Taskforce considers that these recommendations are interdependent; and
- The recommendations in this report are implemented in a staged, planned manner to reflect the principles above.

As part of a remuneration strategy, the Taskforce makes the following recommendations:

Career Pathways

Significant discussion in Taskforce meetings and visits has centred on the idea of creating multiple career pathways for teachers, particularly for those who wish to focus on professional teaching practice. Other pathways might be teacher mentoring, student guidance, ICT, or co/extra-curricular⁶⁸ student learning opportunities.

A broader range of career pathways would offer more attractive career prospects to young graduates and in this way should improve recruitment into the service. It would also improve retention of experienced teachers.

Recommendations

The Taskforce recommends that:

- The range of career pathways be expanded;
- A new career pathway be established for classroom teaching specialists;
- Further new career pathways be established, including teacher mentoring, student guidance, ICT and co/extra curricular student learning opportunities; and
- These career pathways be underpinned by improved professional development and teacher-focussed qualifications.

Professional Development and Recognition of Learning

A model for advanced Secondary Teaching qualifications

In its deliberations, the Taskforce has identified that current professional development is not necessarily 'fit for purpose'. Resourcing for professional development is under significant pressure, leading to inequities in access.

The Taskforce envisages new qualifications pathways to recognise professional practice-based learning and other relevant learning, and to set direction for them. These learning pathways will be built on and extend the professional development teachers undertake throughout their careers.

The qualifications pathways provide a mechanism to formally recognise the advanced learning secondary teachers undertake. This mechanism incorporates milestone qualifications along multiple pathways.

Aims

The qualification would be:

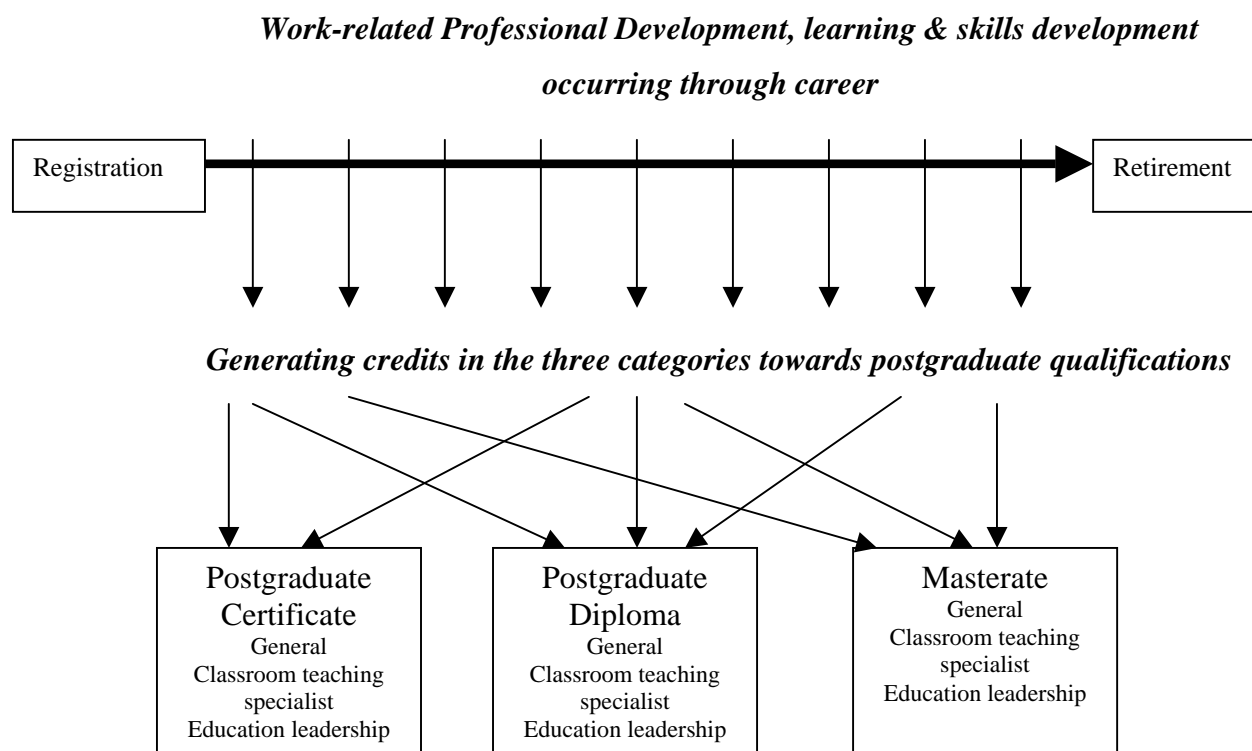
- aspirational;
- owned by the profession, possibly with oversight from the New Zealand Teachers Council;
- assessed against rigorous standards; and
- quality assured.

The standards would include, but would not be limited to, a combination of formal learning, portfolios of work for assessment, research, practice-based learning and assessment of competencies against the standards. The qualifications would be situated in teacher practice and therefore an extension of their everyday work.

Several 'milestone' qualifications would be developed at postgraduate level (possibly Postgraduate Certificates, Postgraduate Diplomas and Masterates (see diagram that follows). These milestone qualifications would be achieved through the accumulation of specified credits. The qualifications would be either New Zealand or National Qualifications on the New Zealand Register of Quality Assured Qualifications ('the Register').

The qualifications will include mechanisms for credit transfer and will have currency in the wider employment market in order to increase the attractiveness of teaching to potential recruits to the service.

A Qualification Pathway Model.



Accumulated credits generate qualifications of appropriate type and appropriate level. It is intended that all teachers should have an equal and transparent entitlement of access both to the qualification pathways and to the milestone qualifications.

There will need to be consideration of resource allocation so that effectiveness of the pathways is maximised in order to:

- Ensure that there is appropriate and accessible professional development and professional development time for secondary teachers to underpin the learning which will form the basis of the pathways;
- Ensure schools and teachers understand and engage with the pathways effectively; and
- Include recognition for knowledge, skills and competencies demonstrated by practising teachers in the classroom or in other roles performed by teachers in schools.

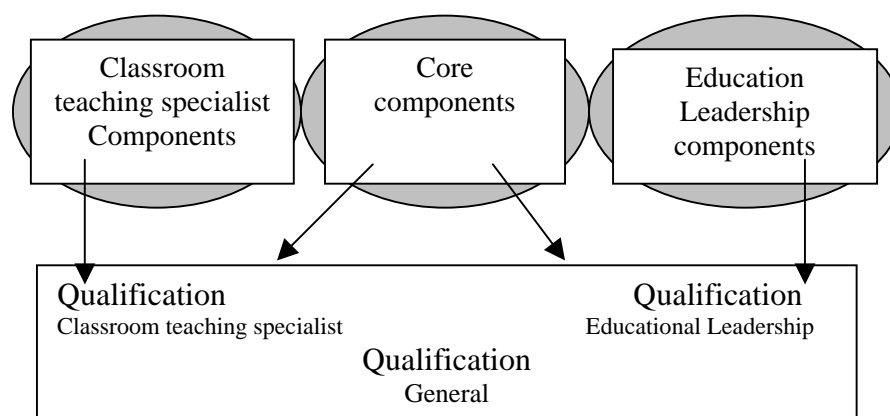
The Taskforce recognises that there will need to be an infrastructure created to support the pathways and that there will be a transitional period during which time the systems and qualifications will be established.

Development and Implementation

The proposed new pathways and qualifications would be registered on the New Zealand Register of Quality Assured Qualifications. The qualifications would be nationally-based, quality assured and capable of recognising both learning through accredited providers and workplace-based learning. Credit transfer mechanisms would allow portability and flexibility. There would be national consistency of assessment. The qualifications would encourage teachers to invest in and build their capability as highly effective teachers. These qualifications must be fit for this purpose.

It is anticipated that there would be several categories of qualification – general, classroom teaching, and education leadership. The credits for these qualifications would be generated from core components, classroom teaching specialist components, and education leadership components. Some core components would be common to all qualifications at a particular level. The other components would be selected by the teacher (from the approved range) and the type of qualification will reflect the emphasis of the majority of components.

Generating career-pathway specific qualifications



Some of the standards, courses and papers which may form the basis of the qualifications may already exist, but more will need to be developed. The details of the qualifications would need to be established by a new stakeholder group, established specifically for this purpose, supported by technical advisers, under the aegis of the NZQA.

Principles of the Qualification Pathways

The new qualification pathways should be designed around the following fundamental principles:

- The qualification will be open to all secondary teachers;
- The qualifications will be either New Zealand or National Qualifications, registered on the Register of Quality Assured Qualifications;
- The key outcome is recognition for teachers of on-going professional learning, including knowledge, skills and competencies demonstrated in the classroom or in the various roles teachers fulfil in schools, which supports improving learning outcomes for all students;
- Existing career pathways should be broadened and classroom teaching should be a viable promotional pathway;
- Teachers should be free to move between classroom based and management career pathways; and
- Many different kinds of study/professional development⁶⁹ should count towards the qualification that should recognise excellent professional knowledge and practice.

Once designed, the qualification will need to be registered on the Register by an appropriate organisation. This organisation will retain continuing responsibility for the qualifications and work with a stakeholder group. The Taskforce favours NZQA as this body.

When the postgraduate teaching qualification pathway is established and operating and assessed to be working, a qualification remuneration model can be developed by a working group of stakeholder for consideration in the 2007 Secondary Teachers Collective Agreement (STCA) negotiation round.

Proposed Qualification Models

During its deliberations the Taskforce considered the advantages of two preliminary models to encourage teachers to undertake the advanced qualifications.

Model A

It is proposed that specialist classroom teacher positions are established on the basis of each school's entitlement staffing.

In order to be eligible for appointment to these positions teachers would be required to hold one of the qualifications from the qualifications pathways.

These positions would have nationally agreed job components, to which schools could add local variations. These required components could include (for example) teacher mentoring, resource development, professional development support for other teachers, support for other teachers working towards pathway qualifications, beginning teacher support and student teacher development.

Each position would generate a number of additional salary units on top of the base scale salary. It is also proposed that these positions would carry with them an additional time allowance associated with the performance of the specific duties which are agreed to define the role. Boards would have to apply for the additional units and time allowances, as they do for other existing additional components, such as the Beginning Teacher Time Allowances. The number of additional units would depend upon the qualification held. The time allowance would be the same regardless of the qualification held.

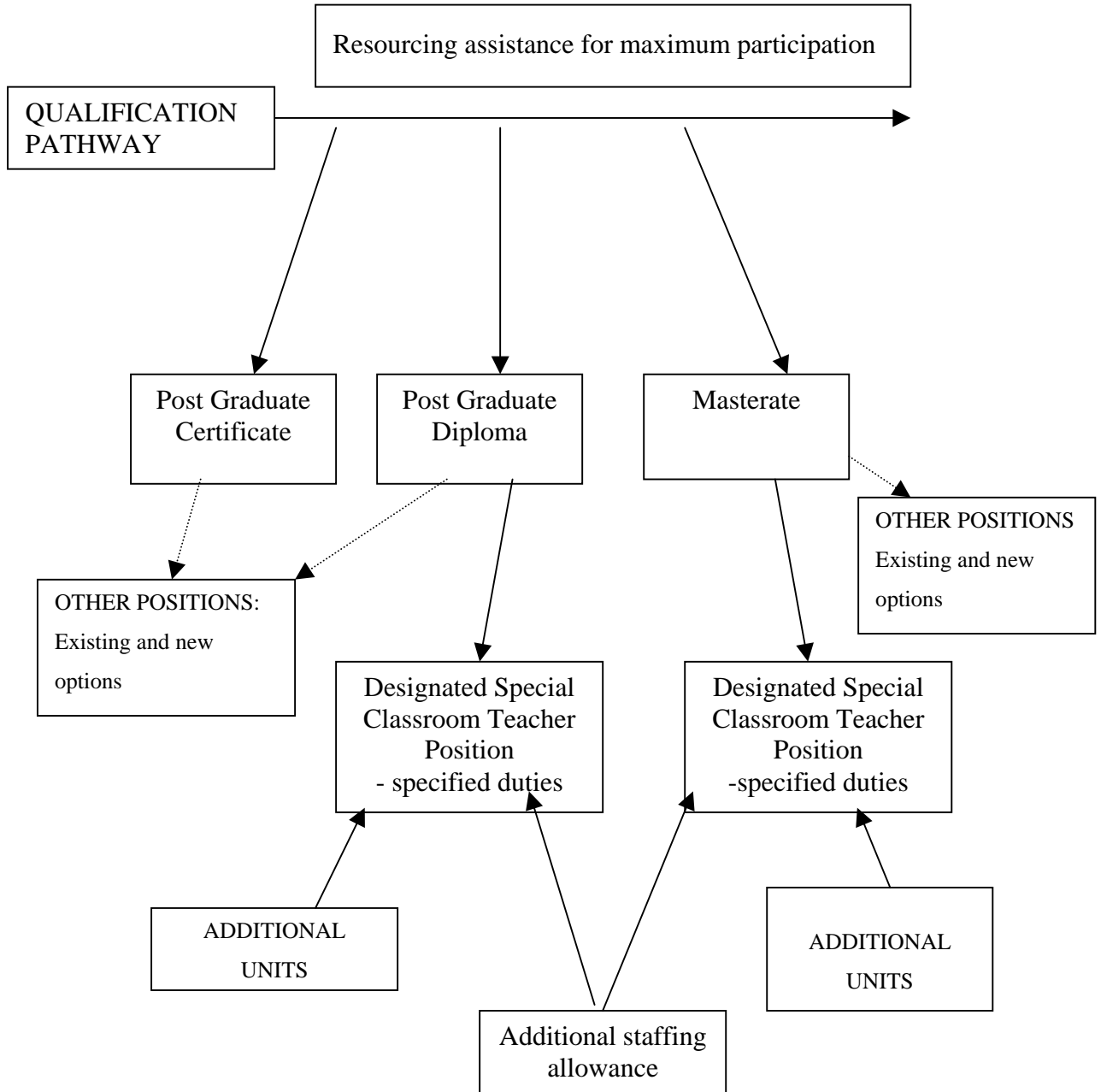
To be eligible for the additional units and time allowance associated with these positions the Board would have to demonstrate that:

- The position was nationally advertised (regraded if there is no actual vacancy)
- The appointee holds one of the qualifications generated from the qualifications pathways.
- The duties of the position include the specified core requirements.

Teachers holding the pathway qualifications would also be free to use these as part of their application for any other teaching or management positions.

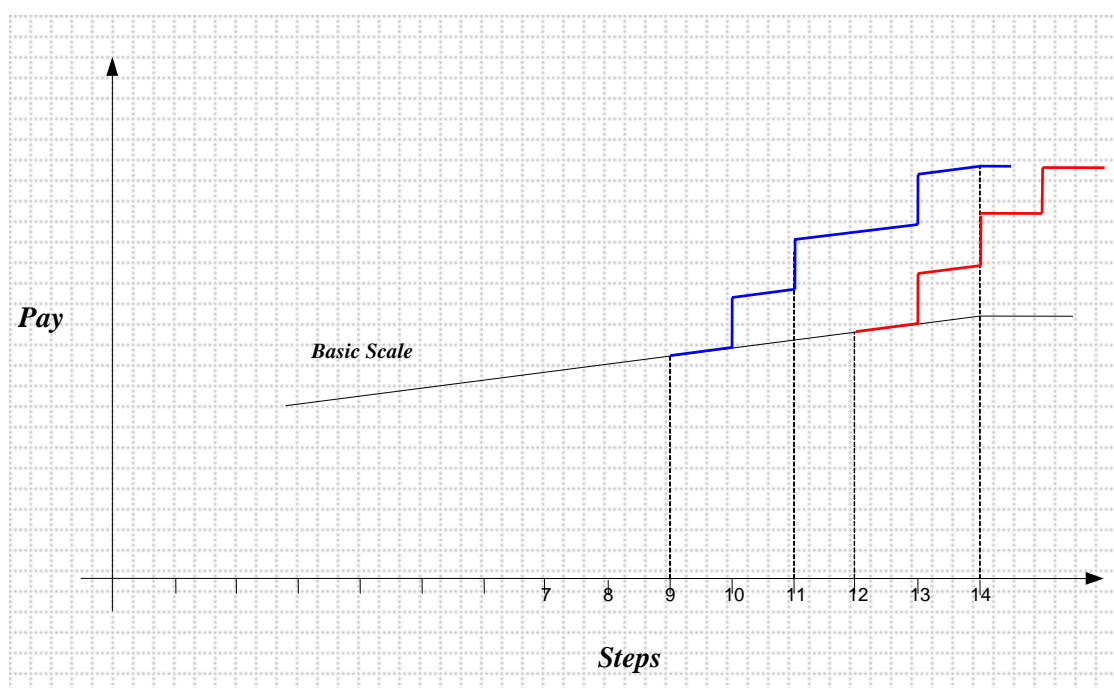
The advantage of this model is that it is consistent with current secondary teacher expectations and acceptance of additional payments above the base scale rates for extra responsibilities.

Specialist Classroom Teacher Positions



Model B

It is proposed that all secondary teachers may access the new qualifications and pathways. On achieving a milestone, either on completion of an advanced qualification, or a set of components, the teacher would access additional remuneration. The teacher would be paid a premium above the base scale, with the premium increasing as each set of components or qualification is achieved, as illustrated in the diagram below.



Generally, a teacher would opt in to the qualifications on approaching their qualifications maximum on the base scale; however, a fully registered teacher may opt in earlier.

The teacher progressing through, and on achievement of, the qualification would provide mentoring, induction and professional development support to other teachers in the school. On achieving the qualification the teacher would be entitled to the specific designation, e.g. Classroom Teaching Specialist.

The benefit of this proposal is that more teachers would be able to access an additional payment without being limited by the number of extra positions available.

Transition issues

Developing and implementing a fully operation qualification pathway for post-graduate teaching qualifications may take until at least 2005. During the transitional phase, detail of the pathways can be communicated so that the system is clearly understood.

In the interim, expected roll growth in the secondary system will demand retention of experienced secondary teachers. This is a matter that will require careful consideration by the Minister.

Recommendations

The Taskforce recommends that:

- Postgraduate practice-based secondary teaching qualifications be developed on the basis of the principles established by the Taskforce;
- These qualifications be designed to underpin a variety of career pathways, including:
 - classroom teaching specialism;
 - teacher mentoring;
 - student guidance;
 - ICT specialism; and
 - co/extracurricular specialism.
- A stakeholder group be established to design these qualifications in conjunction with NZQA; and
- Appropriate resources be allocated to develop, maintain and implement this programme of professional development so that equity of access can be assured.

Salary

Base scale salary structure

The Taskforce understands that the last settlement of the STCA delivered a salary level that appears to be meeting recruitment needs of base scale positions. It is important that this situation is sustained over the next decade while the recommended remuneration strategy is implemented⁷⁰. The Taskforce explored various ways in which this could be achieved but could not reach a definitive position.

Recommendation

- The Taskforce recommends that prior to the commencement of the 2004 STCA negotiations, an objective mechanism be determined to achieve security for teachers in their current remuneration. This mechanism is required to secure a stable industrial environment while a new system is explored and agreed.

Units

In the course of its deliberations the Taskforce heard from a variety of sources concerns about the effectiveness of units in recruiting and retaining middle management teachers.

Recommendation

- The Taskforce recommends that the Government consider the role of units in the recruitment and retention of middle managers.

Recognition of Qualifications

The Taskforce would like to see:

- continued emphasis on qualifications when entering the profession; and
- better mechanisms, through a structured approach, for recognising advanced professional knowledge and practice

Retention of teachers could be affected by increments on the scale dependent upon attestation, as now, but focussed professional development which would enable teachers to develop career pathways could be linked to the remuneration system, attracting more of our best graduates into the profession.

Recommendation

- The Taskforce recommends that when the post-graduate teaching qualification pathway is established, operating and assessed to be working, a working group of stakeholders be established to develop a qualification remuneration model for consideration in the 2007 STCA negotiations.

Non-salary remuneration

- **Exit provisions** – The Taskforce has heard submissions that some assistance may be required for individuals who, because of serious health states, will never return to the workforce and wish to exit the profession with dignity.

Recommendation

- The Taskforce recommends that the Government consider a provision in the STCA for medical retirement.

- **Student loans** – The Taskforce has been advised that approximately 20% of newly trained teachers do not go into secondary teaching. In addition, a significant number of beginning teachers are lost from the profession⁷¹, though a number return within a few years⁷². Together with the growing student rolls and the ageing of the profession, these factors create a need to improve the recruitment and retention of effective new teachers. The Taskforce believes that action does need to be taken to recruit and retain newer teachers generally in the secondary teaching service during those years of current significant loss. The Taskforce notes that the Government has recently introduced a scheme to provide payments to help repay student loans to new teachers in subject areas and in regions where staffing difficulties are particularly acute. The issue of student loan abatement has been raised with the Taskforce during its deliberations as a mechanism to aid recruitment and retention of newer teachers.

Recommendation

- The Taskforce recommends that the Government consider extending a student loan abatement scheme to other target groups as the need arises.

- **Sabbaticals** - The Taskforce has heard submissions in favour of a paid sabbatical system. A sabbatical scheme could be expected to improve retention and contribute

towards improvements in the overall qualification of the teaching force. The Taskforce believes that though such a scheme could be considered at this time, implementation would be difficult in a period of significant roll growth and pressures on retention of teachers. The Taskforce would therefore suggest that any implementation could be effective when falling student rolls begin to ease pressure on secondary teacher supply.

Recommendation

- The Taskforce recommends that the Government consider implementation of a paid sabbatical scheme when falling rolls begin to ease pressure on secondary teacher supply.
-
- **Superannuation** - The Taskforce received many submissions in support of a superannuation scheme for secondary teachers. This was considered in the context of recruitment and retention. It is noted that a wider state sector scheme for an employer contribution to retirement savings has been announced, and that all teachers will be eligible to participate from 1 July 2004. The Taskforce commends the Government on this initiative.

Workload within School Organisation

Workload can be affected by a number of factors within school organisation, including the provision of non-contact time, the level of ancillary support and the environment within which teachers work.

Workload pressures on teachers came through as a key issue of concern in the feedback to the Taskforce from schools up and down the country. The Taskforce believes that the guaranteed non-contact time for secondary teachers has been a significant step in addressing this in a pragmatic way.

However, the Taskforce was presented with a body of evidence indicating that further examination is needed of:

- the role of the teacher and unit holders;
- the workload they carry;
- current best practices of workload management in schools; and
- the structures that teachers work under.

The Taskforce was also advised that some of the tasks undertaken by teachers and unit holders could be performed by ancillary support staff. It is of the opinion that the role of ancillary staff in supporting the work of teachers should also be further examined.

Non-contact time

The Taskforce heard evidence that the contractual non-contact provisions were not always applied. The Taskforce is of the view that all parties should cooperate to ensure that schools observe existing contractual non-contact provisions in order to effectively assist in the management of secondary teacher workload. In turn, more manageable workload will assist in the recruitment, and particularly in the retention of teachers. The Taskforce believes that these contractual obligations should be audited by the appropriate authority.

The Taskforce is particularly concerned about the pressing issue of the recruitment and retention of middle management. The Taskforce is of the view that the allocation of additional non-contact time to teachers engaged in key positions, such as heads of departments, to carry out their administrative, curriculum management and leadership responsibilities would aid significantly in easing the pressure on these positions. There is already considerable evidence here and overseas of the urgent need to consider this issue. The Taskforce therefore recommends that this is one of the areas of consideration of the workload study proposed below.

The Taskforce has heard that the issue of units being allocated without time allowance attached has created a variety of management practices which are not always desirable in terms of educational outcomes. The Taskforce recommends that in the proposed workload study attention is given to identifying good practice in the context of this issue.

The Taskforce heard accounts of some experienced teachers choosing early retirement because of pressures of work. The Taskforce also heard accounts of schools offering reduced class contact time to teachers as they approached the end of their careers. Given the need to retain as many effective experienced teachers as possible, especially through the present secondary roll growth period, the Taskforce further recommends that there be investigation of possible mechanisms to allow reduced class contact time for teachers approaching the end of their teaching careers.

Ancillary Support

The Taskforce has been given considerable evidence to show that more ancillary assistance is needed in secondary schools, but it has not had sufficient time to establish the details of the best ways to apply any additional support, or of the exact quantum needed. More information is required in order to determine how best to allocate resources in this area and it is recommended that the workload study proposed below examine how ancillary staff are currently used and what additional contribution ancillary staffing could make.

Working Environment

The Taskforce noted that there were issues around the physical conditions in which secondary teachers are expected to operate as professionals. The Taskforce commends the Government initiative in providing partial funding for laptops for teachers. The difficulty that the scheme highlighted for the Taskforce, however, was the lack of secure and dedicated workspaces in schools where teachers could effectively operate with the laptops. The Taskforce recognises a connection between professional working conditions and the retention of secondary teachers, especially experienced teachers⁷³. However, it acknowledges that there are property implications in this area which place it outside the scope of the Taskforce's brief.

Workload Study

The Taskforce believes that an urgent study investigate how the work of a secondary teacher and particularly a middle manager could be better structured, resourced and organised in order to support more effective classroom teaching and the raising of student achievement. This study will investigate possible changes in work practices, role definition, non-contact time and the use of specialist and ancillary supports. The workload study should include a review of the best practices of schools. There should be a report back from the study to the stakeholder groups before the end of term two 2004.

Recommendations

The Taskforce recommends that:

- A study be undertaken to consider how the work of a teacher, and particularly a middle manager, could be better structured, resourced and organised in order to support more effective classroom teaching;
- The study include a review of best practices of schools;
- The study consider with urgency the provision of additional non-contact time to middle managers;
- The study consider ways in which the teaching task may be freed up through more effective use of ancillary support, and to establish whether there is a need to fund additional ancillary support, and the quantum that may be required; and
- There be investigation of possible mechanisms to allow reduced class contact time for teachers approaching the end of their teaching careers.

Timeline for Implementation

Time	Industrial	Workload	Qualification Pathways	Remuneration and other conditions	Careers and Professional development
2004 Term 1& 2		Study undertaken ↓ Report end of term 2.	Pathways design ↓	Consideration of student loan extension. Consideration of medical retirement. Determine objective mechanism to determine base scale salary	Resourcing
2004 Term 3 &4	STCA Negotiations	Begin implementation of workload report recommendations		Operation of agreed mechanism	Career pathways development
2005			Qualifications registered		Career pathways implemented Consideration of sabbatical scheme
2006 Term1			Pathways available		
2006 Term 3 & 4			Review of operation.	Qualification remuneration model developed for STCA negotiation.	
2007	STCA Negotiations				
2008					
2009					
2010	STCA Negotiations				Sabbatical implementation.

Summary of Recommendations

The objective of the Taskforce was to come up with recommendations that ensure a supply of high quality, appropriately qualified secondary teachers who will improve the learning outcomes of all students (in state and state-integrated schools).

The Taskforce has developed a strategic, longer term, perspective on the issues facing the secondary teaching sector over the next decade. The Taskforce has explored the issue of teachers investing in, and building their capability as highly effective teachers and how this should be recognised through qualifications and career paths. The Taskforce has considered the effectiveness of the existing system for remunerating secondary teachers to enable boards of trustees to recruit and retain highly effective teachers.

In its deliberations, the Taskforce has explored a range of far reaching issues and considerations. To achieve its objective, the Taskforce proposes a package of interdependent recommendations. This package is intended to be implemented in a staged, managed, well-communicated process. While implementation may extend over a decade, it is imperative that work begin on some of the recommendations immediately and that the majority of recommendations are implemented by 2008. Some recommendations can be implemented quickly, some will require negotiation and some may be acted on by the Minister, subject to Government's decisions about how best to direct its funding to achieve its objectives.

Remuneration Strategy Principles

The Taskforce recommends:

1. The Minister note that the Taskforce considers that these recommendations are interdependent; and
2. That the remuneration strategy be implemented over time to reflect the following principles;
 - An increasingly qualified workforce;

- Enhanced recruitment and retention;
- A national qualification standard for entry to secondary teaching profession;
- Ongoing professional development and recognition of ongoing learning;
- Career structures that reflect a broad range of career paths;
- A remuneration system that recognises the desired characteristics;
- Equal access to the qualifications and career pathways for all secondary teachers;
- Established infrastructure underpinning the remuneration system, with well-designed qualifications and career pathways; and
- A settled industrial environment as a prerequisite.

Career Pathways

The Taskforce recommends that:

3. The range of career pathways be expanded;
4. A new career pathway be established for classroom teaching specialists;
5. Further new career pathways be established, including teacher mentoring, student guidance, ICT and co/extra curricular student learning opportunities; and
6. These career pathways be underpinned by improved professional development and teaching-focussed qualifications.

Professional Development and Recognition of Learning

The Taskforce recommends that:

7. Postgraduate practice- based secondary teaching qualifications be developed on the basis of the principles established by the Taskforce (see page 32);
8. These qualifications be designed to underpin a variety of career pathways, including:
 - classroom teaching specialism;
 - teacher mentoring;
 - student guidance;
 - ICT specialism;
 - co/extracurricular specialism; and
 - educational leadership.

9. A stakeholder group be established to design these qualifications, in conjunction with NZQA; and
10. Appropriate resources be allocated to develop, maintain and implement this programme of professional development and recognition of learning so that equity of access can be assured.

Salary

Base Scale

11. The Taskforce recommends that prior to the commencement of the 2004 STCA negotiations, an objective mechanism be determined to achieve security for teachers in their current remuneration.

Units

12. The Taskforce recommends that the Government consider the role of units in the recruitment and retention of middle management.

Recognition of Qualifications

13. The Taskforce recommends that when the postgraduate teaching qualifications pathways are established and operating and assessed to be working, a working group of stakeholders be established to develop a qualification remuneration model for consideration in the 2007 STCA negotiations.

Non-salary Remuneration

The Taskforce recommends that:

14. The Government consider a provision in the STCA for medical retirement;
15. The Government consider extending a student loan abatement scheme to other target groups as the need arises; and

16. The Government consider implementation of a paid sabbatical scheme when falling student rolls begin to ease pressure on secondary teacher supply.

Workload

The Taskforce recommends that:

17. A study be undertaken to consider how the work of a teacher, and particularly a middle manager, could be better structured, resourced and organised in order to support more effective classroom teaching;
18. The study include a review of best practices of schools;
19. The study consider with urgency the provision of additional non-contact time to middle managers;
20. The study consider ways in which the teaching task may be freed up through more effective use of ancillary support, and to establish whether there is a need to fund additional ancillary support, and the quantum that maybe required; and
21. There be investigation of possible mechanisms to allow reduced class contact time for teachers approaching the end of their teaching careers.

End notes to the Report.

¹ Māori and Pasifika students are expected to make up 40% of the school population by 2023.

² Particularly Asian students. Note the term “Asian” includes people from the large peninsulas of Asia Minor, India, Arabia, and Indochina and the island groups of Japan, Indonesia, the Philippines, and Ceylon (Sri Lanka); contains the mountain ranges of the Hindu Kush, Himalayas, Pamirs, Tian Shan, Urals, and Caucasus, the great plateaus of India, Iran, and Tibet, vast plains and deserts, and the valleys of many large rivers including the Mekong, Irrawaddy, Indus, Ganges, Tigris, and Euphrates.

³ Retention of students has particularly increased into year 13, where numbers have more than doubled since 1987.

⁴ “At risk” students include increased numbers of students entering secondary school who do not have literacy and numeracy skills necessary for secondary schools.

⁵ Māori and Pasifika school leavers are less likely to go directly to tertiary education, particularly to university, and the education system plays a crucial role in supporting te reo and tikanga Māori.

⁶ Reflected in achievement data from the Programme for International Student Assessment (PISA), Trends in International Mathematics and Science Study (TIMSS), National Education Monitoring Project and Progress in International Reading Literacy Study (PIRLS).

⁷ Recent changes in the secondary school population (especially in the senior years) and results from international studies such as TIMSS and PISA have highlighted three key features of student achievement patterns in New Zealand:

1. Wide variation of achievement between highest and lowest achievers;
2. Wider “within school” than “between school” variations; and
3. High average levels of achievement.

⁸ Ministry of Education, March 2003.

⁹ New Zealand had the largest within school variation of any OECD country. That is, the vast majority of the difference in student achievement was found between students in the same school. In comparison with other countries, the between school variation in New Zealand was small. In general, countries with different types of institutions (for example, countries which have academic or vocational schools) did not perform as well, on average, as countries that had non-selective schools (i.e. schools did not select on ability).

¹⁰ For example the AimHi and Strengthening Education in Mangere and Otara (SEMO) interventions.

¹¹ In some schools this has been accompanied by an increased use of overseas qualifications and assessment.

¹² There has also been curriculum change in response to external changes e.g. Text and Information Management replacing typing.

¹³ The NCEA was developed as a high quality flexible qualification that took account of these changes and would also meet the requirements of employers and students in the future. With its introduction there has been an increased workload for teachers as they have moved from a norm-based to a standards-based qualification system that has involved both internal assessment and external assessment.

¹⁴ Gateway and Secondary Tertiary Alignment Resource (STAR) funding enables students to take tertiary courses while at secondary school, e.g. tourism.

¹⁵ **Knowledge** is no longer something that is produced in order to be stored away ‘just in case’. Instead, it is something that makes things happen. There is a greater emphasis on solving particular, specific, real-world problems. There is also a greater emphasis on the skills needed for learning to learn and for enabling old knowledges to be used by students as raw material to generate new knowledge.

¹⁶ There are a number of initiatives aimed at gaining better value from ICT in secondary schools. Some of these initiatives are direct and others, indirect:

- ‘Digital Horizons’, includes strategies for developing infrastructure, teacher and school capability, and digital learning resources. The strategy currently includes funding for the ICT Professional Development Cluster programme, the ICT Helpdesk, Te Kete Ipurangi, Microsoft package for schools, and other initiatives.
- The Laptops for Secondary Teachers (STELA) scheme was introduced in 2002. The state paid two-thirds of the leasing costs of a laptop for year 9 to 13 teachers. Laptops for Year 7 to 13 Teachers (TELA), in effect replaces the STELA scheme and extends its coverage.

¹⁷ In terms of hardware, software and training.

¹⁸ 18,347 headcount as at payrun 801 (1 April 2003), includes limited term and permanent full and part time teachers. Excludes day to day relievers.

¹⁹ as at payrun 801.

²⁰ based on teachers of all designations as at payrun 801.

²¹ headcount, based on payrun 811 data (19 August 2003).

²² headcount, based on payrun 817 data (11 November 2003).

²³ as at payrun 817.

²⁴ Several factors will impact on the number of FFP students in New Zealand schools including the strength of the New Zealand dollar, New Zealand's perceived and actual competitiveness, perceptions about the quality of New Zealand's education system, the desire by schools to recruit such students for whatever reason, and the general desire to travel.

²⁵ To date implementation has added 541 FTTE secondary teachers, with an additional 362 FTTE teachers to be funded from 2004.

²⁶

Loss Rates (%) for secondary teachers 1992-2002

Year	Loss Rate
92/93	11.2
93/94	13.2
94/95	15.5
95/96	15.8
96/97	12.6
97/98	11.8
98/99	12.3
99/00	12.6
00/01	13
01/02	13.9

Note: loss rates are from the permanent stock of teachers and loss includes:

- Teachers on leave without pay
- Teachers who leave the teaching profession
- Permanent teachers who move to limited term positions

This data is from payrun 804 (13 May 2003)

²⁷ Reported factors include family and personal circumstances, retirement, ill health, student loan pressures, and movement to other jobs. Movement from teaching is frequently associated by teachers with salary rates, workload issues and student behaviour.

²⁸

Loss Rates (%) for secondary teachers in management positions (excluding principals) 1992-2002

Year	Loss Rate
92/93	7.1
93/94	9.1
94/95	10
95/96	10.1
96/97	8.2
97/98	6.7
98/99	7.1
99/00	6.9
00/01	7.5
01/02	8.6

²⁹ This reflects patterns in the wider workforce. Younger teachers are more likely to leave to travel or to have children, and older teachers are more likely to be retiring. Loss rates from retirement will rise in the next decade as the teaching population ages.

Stock Age	92/93	93/94	94/95	95/96	96/97	97/98	98/99	99/00	00/01	01/02
17-19										
20-24	6.9	6.3	22.2	21.2	38.9	17.5	16.2	9.7	11.2	15.2
25-29	14.5	16.2	22.0	21.1	19.5	20.0	21.3	21.6	20.3	23.2
30-34	13.1	15.4	17.1	18.7	16.4	12.9	15.5	16.9	16.3	17.8
35-39	7.7	11.1	12.1	11.8	12.1	8.3	8.8	10.9	10.2	12.1
40-44	5.7	7.4	8.9	10.0	8.0	6.0	6.9	6.3	8.4	8.6
45-49	6.6	8.1	8.3	9.0	7.5	5.7	5.5	5.2	5.5	6
50-54	6.9	8.6	10.1	10.7	7.5	6.9	5.9	6.2	7.7	7.3
55-59	9.7	13.7	14.1	15.3	10.7	8.3	8.1	7	8.3	8.8
60-64	39.0	40.7	36.9	31.3	19.0	21.1	18.5	15.5	12.7	15
65-69							26.7	25.3	23	32.4
70-74							25	60	20	25
75-79							100			
Unknown					21.4	14.3	24.1	35.6	18.2	38.8
TOTAL	8.8	10.9	12.5	12.9	10.6	9.0	9.3	9.4	9.9	11.1

³⁰ 50 to 70 percent of secondary teacher graduates are appointed in the year following graduation. 66% of the 2001 graduates secured teaching positions in 2002, up from 51 percent in 2001. The total number of students enrolled in secondary teacher education programmes increased to 1,777 in 2002 from 1,645 in 2001. Secondary student teacher enrolments have increased again this year, by 21 percent overall, with a slightly higher increase in Auckland. In 2002 just under 9% of the secondary teaching force were in their first two years of teaching.

³¹ This proportion is higher for teachers in the younger age groups, with 70 percent of teachers in the 20-29 age group returning after seven years. Half of these returning teachers have returned after one year.

³² This increase is likely to be because of a number of factors including recent increases to teacher salaries as a result of the settlement of the Secondary Teachers' Collective Agreement, recent publicity in the UK for the Interantional Relocation Grant, and international events (e.g SARs and September 11).

³³ At the start of the 2003 school year, there were 491 overseas secondary teachers who had started this year or in 2002, making up 2.5 percent of the secondary teaching workforce.

³⁴ One outcome of the most recent settlement was the introduction of a qualifications-based step on the salary scale. This has resulted in a number of teachers not being able to access the new step. There is now a process in development to assist these teachers to upgrade their qualifications thus enabling them to access the new step.

³⁵ A teacher's base salary rate on appointment is determined by their qualifications and relevant work history. Teachers with the standard entry requirements of a three-year subject degree and recognised teaching qualification enter at step 7 (\$37,323) and can progress to the top step of the salary scale (\$56,393) over 7 years. Teachers progress annually, subject to meeting performance standards, to this step or their relevant qualifications maximum step on the base scale.

³⁶ Units were introduced in 1996 to give schools flexibility to develop management structures that meet local circumstances. The number of units received by a school is based on the following formula (1.2 * generated staffing) +8, where *generated staffing* equals *entitlement staffing* plus *eligible attached teachers* minus one (i.e. the principal). Each unit is currently worth \$3,000 and approximately 10,750 (as at payrun 817) teachers hold one or more units.

³⁷ **HPTSA** is a payment of \$2,500 p/a to registered teachers who hold fewer than 5 permanent salary units and are employed in one of the nineteen HPTSA schools. Currently 420 teachers receive this payment (as at payrun 817, 11 November 2003).

³⁸ **SIA** is a payment of \$1,000 p/a for a three-year period to teachers in four identified SIA schools who hold fewer than 5 permanent salary units. Currently 168 teachers receive this payment (as at payrun 817).

³⁹ **MITA** is a payment of \$3,000 to fully registered Māori immersion teachers in approved immersion courses. Currently 106 teachers receive this payment (as at payrun 817).

⁴⁰ The **RTLB** Allowance is payment of either an extra salary step or a unit to Resource Teachers of Learning and Behaviour.

⁴¹ The **Service Increment** is a payment of \$1,578 for teachers who have been at their qualifications maximum for a minimum of three years if they do not hold permanent units and have either improved their qualifications or entered the teaching profession with a G3b qualification or higher. Currently 716 teachers receive this payment (as at payrun 817).

⁴² The Careers Adviser Allowance is \$1,054 per annum payable to teachers without permanent units. Teachers with permanent units can only receive this allowance with the approval of the Secretary for Education. Currently 238 teachers receive this payment (as at payrun 817).

⁴³ The Acting in a Higher position other than Principal Allowance is the difference between the teacher's salary and the rate for the position he/she is relieving in (but not more than the rate of three units above the teacher's own salary).

⁴⁴ The Associate Teachers Allowance is \$3.19 for each timetabled hour of teacher trainee contact.

⁴⁵ The Sixth Form Certificate Allowance is paid at the rate of \$49.60 per hour, up to a maximum of nine hours per year.

⁴⁶ The Bus Controllers Allowance is \$3.61 per day for the first route and \$1.26 per day for each additional route. Currently 21 teachers receive this payment (as at payrun 817).

⁴⁷ The Field Allowance of \$12.72 per day plus \$7.14 per day incidentals allowance, is payable to teachers supervising students attending a school camp for more than one complete day.

⁴⁸ These generate costs either directly to schools or to Vote Education.

⁴⁹ 3 hours per week in 2003, 4 hours per week in 2004 and schools will endeavour to provide 5 hours per week in 2005.

⁵⁰ Trained beginning teachers in their first year who are employed full-time shall be a 0.8 charge against the school staffing entitlement but shall receive full salary and shall not have more than 20 hours of allocated duties during normal school hours each week. Trained beginning teachers in their second year who are employed full-time shall be a 0.9 charge against the school staffing entitlement but shall receive full salary.

⁵¹ There are approximately 70 Te Atakura teachers, each receiving a 0.5 FTTE time allowance

⁵² Schools have the discretion to make payments to individuals of \$3,000 for recruitment, retention or responsibility. This money comes out of board funds. Currently 635 teachers are in receipt of one or more RRR payments in the secondary sector.

⁵³ Current policies include:

- Secondary Subject Trainee Allowance (SSTA);
- TeachNZ scholarships and Maori and Maori-medium teacher supply review;
- Conversion courses for primary teachers; and
- Hard to staff positions and teacher supply allowances and grants.

⁵⁴ Comparison is between the entry point and maximum salary steps for teachers with the minimum required training and qualifications.

⁵⁵ OECD at a Glance 2003, table 5.

⁵⁶ OECD at a Glance 2003

⁵⁷ Teachers are only eligible for the service increment if they do not hold any management units

⁵⁸ The 2003 PPTA Annual Conference repeated the rejection of performance pay

⁵⁹ Beginning teachers gain initial registration after two years. Registered teachers must renew their registration every three years.

⁶⁰ This was proposed in the 1994 Schools Consultative Group report

⁶¹ Until 1992, teachers had access to the Government Superannuation Fund. Currently 2111 (headcount) teachers are members. A retirement savings scheme currently exists which primary teachers and principals have access to as provided by their respective collective agreements. A wider state sector scheme has recently been announced by the Government, to take effect from 1 July 2004, which secondary teachers will be able to access.

⁶² This scheme provides secondary teachers of maths, te reo Maori and physics with \$2,500 each year in their second, third and fourth years of teaching to go towards repaying their student loans. Teachers in hard-to-staff areas who teach English, chemistry, physical education, computing and biology will also be eligible.

⁶³ A recent OECD "scenarios for the future" exercise developed a number of models, two of which can be summarised as follows:

Scenario 3: Schools as core social centres

- Schools as well regarded and supported community institutions providing a bulwark against fragmentation (sometimes referred to as a "social anchor")
- Schools at centre of effective interagency co-operation
- Social outcomes (eg, citizenship) are held in regard alongside cognitive outcomes
- More diversity but also cohesion, less inequality
- Schools less bureaucratic and more experimental in organisation

- 'high school walls' eroded, less division between age groups
- a core of high status and well rewarded professionals not necessarily in lifetime careers
- more varied contractual arrangements for employment and a greater role for other professionals and stakeholders/contributors

Scenario 4: Schools as focussed learning organisations

- High demand curricula the norm for all students catering for greater specialisation but a demanding mix of learning required
- Major investment in raising achievement of all students towards the highest level
- Schools with distinct profiles with strong focus on the creation and use of new knowledge about the processes of teaching and learning - investment in R&D
- ICT strongly developed as a learning tool and for analysis and communication
- Flatter, team-oriented staffing structures
- Links between schools and between schools and tertiary providers, 'knowledge industries', including internationally
- Greater mobility in and out of teaching and other knowledge professions
- More varied contractual arrangements
- Increase in staffing levels to allow for research component in teachers' everyday work

⁶⁴ This is, in any event, required by the State Sector Act 1988.

⁶⁵ There are a range of types and purposes of quality professional development. Some leads to accreditation, and some, while equally valuable in improving learning outcomes, is informal.

⁶⁶ Indicators of general labour market shortages can be seen in increases in turnover rates and vacancies taking longer to fill, declining applicant numbers, and increased use of sub-optimal appointments. The issue in the secondary sector is reflected most strongly in parts of the school sector, (e.g. location, subject, skills).

⁶⁷ The secondary teacher remuneration system exists in a specific context. It is funded by the state and is negotiated through a Collective Agreement with a highly collegial workforce with a high level of union coverage. Negotiations with the state as employer create issues of financial affordability which may not be reflected to the same extent in the private sector.

⁶⁸ Co-curricular learning opportunities are those that are driven by the curriculum (eg. Drama production); extra-curricular learning opportunities are those that are outside the general curriculum (eg. Rugby)

⁶⁹ The following list indicates some of the knowledge and skills which may be part of the accrediting:

- Communication skills
- Theory and practice of literacy and numeracy
- Māori: te reo, tikanga, te ao Māori
- Management skills
- Leadership skills
- Project management skills
- Performance management skills
- Action research
- Learning theory
- Mentoring
- Pedagogy
- Subject-specific advanced knowledge and skills
- Assessment for qualifications, standards-based assessment, NQF
- Extra-curricular knowledge, skills and practice.
- Public policy
- Education policy
- Evaluation as a teaching tool
- Motivation
- Behaviour management and classroom management
- Portfolios.

⁷⁰ The remuneration implementation proposed by the Taskforce assumes that the STCA settlements will be for terms of three years.

⁷¹ 6% are lost in the first year, 21.5% (cumulative) after 2 years and 38.49% (cumulative) after 3 years

⁷² within 2 years, 21% have returned.

⁷³ Loeb and Page (2000), Review of Economics and Statistics, 82 (3), pp 393-408.