

# Branch handbook

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A rough guide to organising your PPTA branch

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PPTA represents the professional and industrial interests of secondary and area school teachers and principals.

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## **Welcome: Nau mai haere mai**

Thank you for taking on the position of being a branch representative at your school.

PPTA Te Wehengarua representatives are at the heart of how we work. They are elected by members in their school and are the first point of contact for information and advice. PPTA Te Wehengarua is here to support you in this key role.

This handbook provides you with information that you will find helpful in carrying out your work as a branch representative.

The information in this document is a quick reference only; more detailed information is available at [ppta.org.nz](http://ppta.org.nz) or by contacting your local PPTA office.

It is with great pleasure that we introduce you to the branch handbook.



**Michael Stevenson**  
**General Secretary**



**Jack Boyle**  
**President**

## **PPTA, where teachers stand together**

The Post Primary Teachers' Association Te Wehengarua is the professional body and union representing secondary teachers.

We work together to support teachers and advance public education in New Zealand.

## **How PPTA works**

PPTA is the voice of secondary teachers, with over 17,500 members. Each secondary, area school and technology centre has its own PPTA branch in one of 24 regions. Regions are represented on a national executive and at annual conference.

PPTA's executive and its Māori partner, Te Huarahi Māori Motuhake, are elected bodies that work for members nationally.

There are also networks for women, Pasifika teachers, new teachers, principals, deputy principals, assistant principals, LGBTIQ+ teachers and other groups.

PPTA's annual conference is the forum where members debate and construct major policies.

## **Supporting teachers**

PPTA provides advice, guidance and advocacy about members' conditions of employment. Members enjoy the following benefits:

## **PPTA member benefits**

- National collective agreements that guarantee pay and conditions
- Professional and legal advice and advocacy, and representation to help resolve employment problems
- Professional development, including delegate training and employment relations education
- Professional networks where you can take part in decision-making, debate crucial education issues, and influence professional issues at a national level
- Accommodation, rental car, banking, retail, health and travel insurance discounts

## How to join

Teachers can join online at [ppta.org.nz](http://ppta.org.nz) or get a membership form from your branch chair or local field office.

## The branch

### The role of the branch

There is a PPTA branch in each school, which means you and other branch representatives are the main point of contact for most members.

Regional officers, the national executive and branch representatives have a role representing members and the interests of education generally.

Your work is vital in developing the interest, participation, enthusiasm and determination of our members - which is the strength of the PPTA.

It is your role to send information about your members' aspirations and what is happening in schools to the PPTA, and for members to receive the information and assistance in their working lives to which they are entitled.

Branches and branch representatives have a responsibility to:

- Monitor conditions within the school, including compliance with the relevant collective agreement
- Make sure members who have problems receive assistance where appropriate
- Recruit non-members
- Implement PPTA policy in the school
- Keep in touch with their PPTA regional team
- Let the executive and the region know your branch's views
- Make sure you pass on information from PPTA to your members
- Elect branch representatives including a branch chair

### The roles in the branch

Many branches are now led by an elected collective of branch representatives, among whom tasks are shared out as they arise. The size of the branch will determine the number involved in branch leadership. Each branch is autonomous and has access to funds from their region.

Traditional branch positions include the chair, secretary, treasurer, and various representative roles.

## What does a branch chair do?

The branch chair should be a person who has the trust and confidence of members. The role can involve considerable interaction with school leaders. Some schools give branch chairs non-contact time to do the role.

### Branch chairs

- Chair branch meetings
- Take a leadership role to help resolve or raise workplace issues on behalf of members
- Lead branch delegations to the principal and board of trustees
- Communicate with the regional chair, the executive member and the local PPTA field office
- Contact and involve the wider PPTA (field officer, regional chair, executive member, national office) when situations warrant their involvement
- Help members resolve employment problems, including contacting the field officer if advice and/or representation is needed
- Monitor membership levels and recruit non-members
- Become familiar with the terms and conditions of the collective agreement, and always seek advice from the field officer if unsure
- Have a reasonable understanding of the PPTA constitution, in particular rules 5-20 relating to membership and branches, and the code of ethics.
- Become aware of key PPTA dates
- Make sure there is branch representation at regional meetings
- Make sure all branch members attend paid union meetings
- Liaise with the field officer regarding branch visits

## What does a branch secretary do?

The secretary is a crucial role in the efficient running of the branch.

### The branch secretary

- Keeps minutes of all branch and committee meetings (to record motions carried and action points to complete)
- Receives and distributes communications, including email newsletters and the PPTA News
- Completes branch membership returns and notifies changes to membership during the year.
- Is the branch returning officer (except for the election of branch secretary) and must ensure that voting procedures for all PPTA elections are carried out impeccably
- Liaises with the field office and regional team

### **What does a branch treasurer do?**

Branch treasurers are responsible for ensuring that a simple and accurate record is kept of how money is used.

They make sure spending is planned and that decisions about spending branch funds are made in a democratic way and are recorded in the committee minutes.

PPTA funds should be used only for matters which advance the constitutional objectives of the association.

Some branches have moved to having branch funds managed centrally through their regional committee. This reduces the workload associated with the treasurer's role.

### **What does a branch women's representative do?**

A branch women's representative is an important link in PPTA's women's network.

This person should be the point of contact for women teachers who have questions about conditions of service, and should encourage women staff to join, particularly part-timers.

They should distribute information provided by PPTA's women's officer and the regional women's co-ordinator, and should ensure that women branch members have opportunities to discuss matters of particular relevance to them and a means of expressing their views.

### **What does a health and safety representative do?**

Health and safety representatives advocate for members in matters relating to health and safety, including monitoring and investigating. They are entitled to two days paid leave every year for training.

Health and safety representatives should advise their field office when they are elected so the office can arrange training.

## **Recruitment**

Recruiting new members is one of the branch's most important responsibilities.

Here is a 10-step plan to assist with recruitment at the beginning of the year.

1. Get a staff list for the current year
2. Get a current PPTA branch member list. Lists will be sent to the branch in February or can be downloaded from the PPTA website (see following page)
3. Tick off the branch members on the staff list

4. Divide the names of teaching staff members who do not appear on the PPTA branch list among members of the branch committee
5. Members of the branch committee should then approach new staff members and check their membership status. Ensure any non-members are given a membership form, a copy of the Join PPTA brochure and information about membership benefits
6. Follow-up with people who have been given membership forms
7. Post the forms to PPTA national office promptly and keep a record of having sent them. A teacher is deemed to be a member at the time their signed membership form is received by a PPTA official (this includes the branch officers)
8. When having discussions with new staff members check that :
  - They were offered the relevant collective agreement
  - They have an appropriate letter of appointment.
  - They were given information about applicable allowances.
  - First year teachers have completed a salary assessment form and have their correct non-contact entitlements
9. If the letter of appointment states that the member is fixed term, visit *Appointments to Teachers in Secondary Schools* in the *Advice and Issues* section of the PPTA website to check whether the reason given is valid. If in doubt get in touch with your field officer
10. Keep new (and existing) members informed about:
  - branch and regional meetings
  - Mahi tika courses
  - Branch officer training
  - Health and safety courses
11. Congratulate yourself and your team on the efficient management of the branch.

Note: Repeat steps 5 to 10 above as and when required!

### How to access branch membership lists

Branch officers can access a membership list for their branch by contacting their local field office or from the website.

Go to [ppta.org.nz](http://ppta.org.nz)

To log in:

- Your username is your email address or your MoE number (no zeros in front)
- Your password is your MoE number (no zeros in front), unless you have changed it.



Change your password after you log in if it is still your MoE number

Click on *View branch lists*

## Meetings

### Branch meetings

Branch meetings should be held at least once a term to discuss PPTA business and allow members to raise and discuss issues. Some branches have these scheduled as part of the school's meeting cycle. Additional meetings may be held to deal with urgent matters as they arise.

When raising issues with the principal or the board, it is important that the branch has given its authority to have those matters raised. Such authority comes from motions being passed in the branch meeting.

### Meetings with the employer

Meetings with the principal are an important part of this role. Motions passed from the branch meeting will often need to be relayed to the principal. Members may also request that the branch chair raise individual matters on their behalf, or accompany them to meetings.

The branch chair and the principal should have open and honest communication and not mislead the other. Good faith is fundamental to the employment relationship. This does not mean that agreement will always be reached.

Occasionally the branch chair will need to meet with the board of trustees. The requirements for good faith also apply to any communication to and from the board. It is advisable to make yourself known to the board chair.

When meeting with the employer it is good practice to:

- Be well prepared, including doing any research
- Decide on the make-up of the delegation
- Confirm the meeting time and agenda in advance of meeting, including notification of who will be attending
- Keep minutes of matters discussed
- Record any agreement reached
- Follow up with a letter to the principal confirming what was discussed and agreed to at the meeting
- Report back to the branch

## Tips on engaging with principals and the community

- Keep it professional – maintain a high standard
- Our principals are members too – albeit under a different collective agreement
- Be open to dialogue; quote facts – no need to apologise for a reasoned, evidence based stance
- Know when to seek help or advice – from a field officer, regional chair/executive member, etc

## Good faith

Employers and employees are obliged to deal with each other fairly, reasonably and in good faith at all times. In broad terms, this means that both employers and employees must:

- act honestly and openly
- raise issues in a fair and timely way
- be constructive and cooperative
- be proactive in providing each other with relevant information and consider all information provided
- respond promptly and thoroughly to reasonable requests and concerns
- keep an open mind, listen to each other
- treat each other respectfully

Good faith generally involves using practical common sense. Acting in good faith reduces the risk of conflict and problems. It is also a minimum requirement of the Employment Relations Act 2000.

## Other meetings

### Regional meetings

The branch needs to be represented at regional meetings.

### Paid union meetings (PUMS)

The branch chair has a responsibility to ensure members attend these and that a roll is taken, and a copy of the roll provided to the principal for payroll purposes.

### Individual meetings

The branch chair will, from time to time need to meet individually with members of the branch and with the field officer. When dealing with individual cases be mindful of issues of confidentiality.

## Media contact

Any contact with the media should be through the regional chair (for local issues) or through the PPTA president. If you are approached by a member of the media for comment on a particular situation, check first with your regional chair and national office before commenting.

## Consultation

Consultation is about seeking the advice and opinions of others. It does not require full agreement, but must be more than prior notification. The initiator of consultation must provide enough information to allow meaningful discussion, and be willing to accommodate the views of the people consulted.

The collective agreements require that schools must consult with employees before making a number of staffing decisions. These include:

- Distribution of units
- Distribution of Middle Management Allowances (MMAs) and Senior Management Allowances (SMAs)
- Timetable policy (this includes non-contacts, class size and hours of work)
- Surplus staffing

Refer to the *Collective Agreements* section of the PPTA website.

In addition, schools should consult with staff on policies and issues that affect their day to day employment.

## Getting into action

If there is an issue at your school that will require branch action, a good place to start is to apply the “AHA” (anger, hope, action) methodology. This is designed to move members past apathy and to empower them to take action to improve their situation.

### Anger

This emotion highlights the issues that are widely held and deeply felt. In discussion with members you could ask what concerns them about work, what is the effect of the issue and what they are prepared to do to sort out the problem.

### Hope

Once the issues are identified, ascertain whether the identified issues are winnable in part or in whole. This will influence how the branch reacts to the concerns.

You can share some success stories with them, where members at your school or elsewhere have improved conditions by acting collectively. Remind the branch that if enough people take action, change can occur.

## **Action**

Plan as a branch some action to take collectively, whether that involves writing letters, calling meetings or taking other steps. No matter how small the action, the collective approach will improve branch confidence and effectiveness. A series of actions related to an issue is what constitutes a campaign.

Branch campaigns can be very useful and are an effective tool to engage members, resolve issues, and effect change.

Many decisions made by the executive require branch action and support in order to succeed. An example of this is the action around national collective agreement negotiations, where the branch representatives have an important role.

## **Role of the field officer**

The role of the field officer is to support members who require representation, as well as provide advice on employment rights and guidance for interpreting the collective agreements.

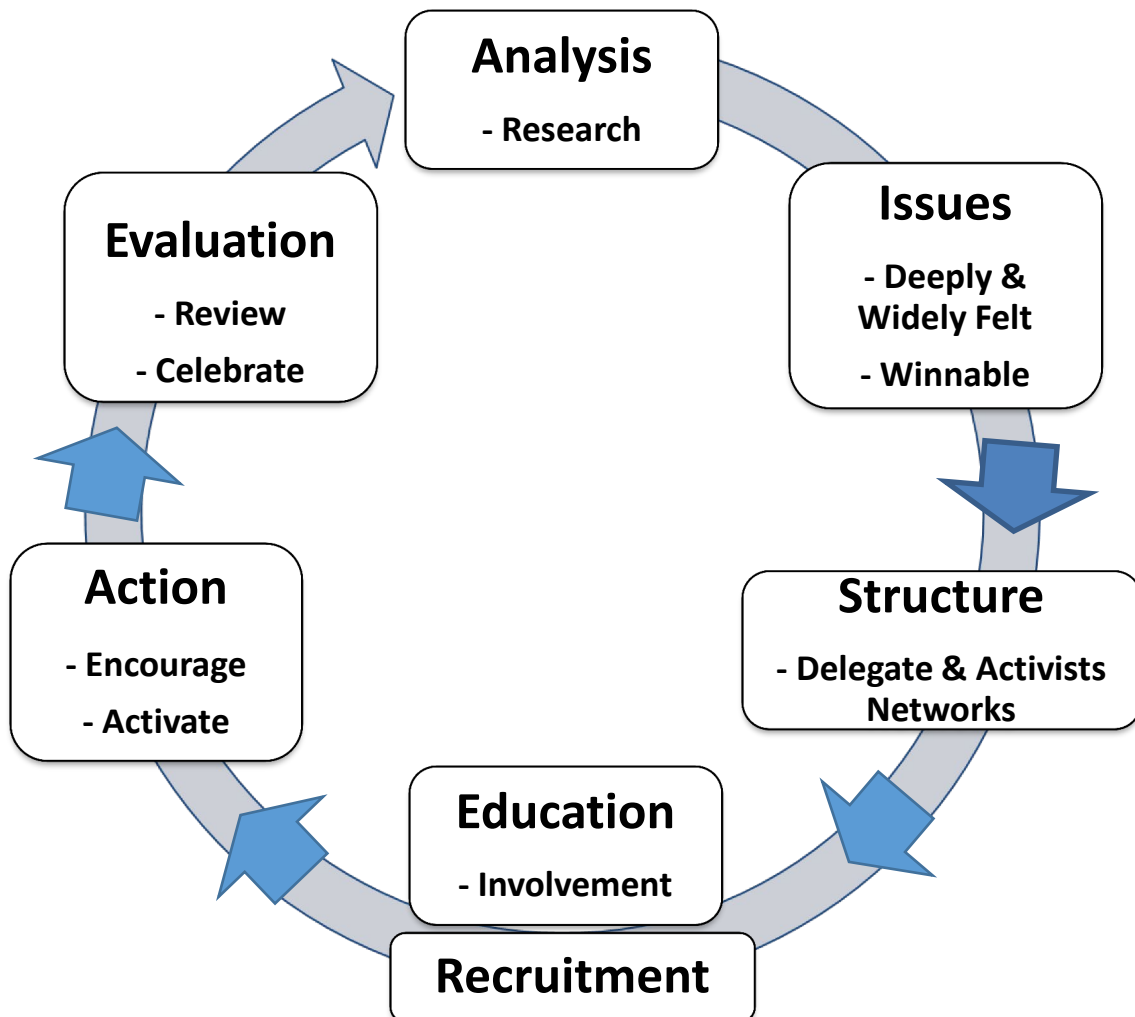
The expectation is that branches should initially attempt to resolve disputes in the workplace.

It is advisable to call the field officer for complex issues including discipline, surplus staffing, competence, and disputes over the interpretation of the collective agreement and unresolved health and safety problems.

The field officer may also attend branch meetings if invited, provide advice around school policies and may also run seminars/workshops for branches about specific issues (e.g. surplus staffing or bullying).

## Branch campaigns

The following is a model to help plan a campaign at branch level.



### Analysis

- Has there been a systematic examination or evaluation of data or information?
- Are complex issues broken down into smaller components to aid understanding?
- What does the collective agreement, relevant law or school policies say about the issue?
- What further information or support is needed?

## Issues

- Is the issue widely held and deeply felt?
- Is it winnable in part or in whole?

## Structure

- What structures are in place within the school / branch that can be used in this action?
- How will the region or national structures and networks be involved?

## Education / Recruitment

- Is everyone aware of the issue?
- How are people going to be informed of the issues, actions, and possible solutions?
- How will people be involved?
- In what ways will this be an opportunity to activate members and recruit non-members?

## Determining the action

- What action is the branch comfortable taking?
- Who is willing to do what? By when?

## Evaluation

- Review and follow-up what went well and where there are future opportunities for success
- If that action does not work, what are the next tasks or alternative action which can be taken to address this matter?

## Celebrate your success as a branch!

## Checklist for branches

### Members

- Do you have a current branch list? How many members does your branch have?
- What percentage of teaching staff are members? Is your density over 80%?
- Are new staff and other non-members approached and encouraged to join?

### Positions

Does the branch have an active branch committee? Are people prepared to take leadership roles in the branch? Would they take on the roles of:

- Chair
- Secretary
- Treasurer
- New and establishing teachers (NETs) representative
- Women's network representative
- Rainbow network representative
- Te reo a rohe representative

### Health and safety

- Is there a health and safety committee? Do you have trained health and safety representatives?

### Finances

- Does the branch claim its annual capitation, or does it run its finances through regional accounts?
- Does the branch have a bank account?

### Meetings

- Does the branch meet at least once a term? Are meetings well attended?
- Are branch meetings part of the school meeting cycle?
- Is an agenda circulated prior to meetings? Are meeting procedures followed and minutes kept?
- Does the branch chair/committee meet on a regular basis with the principal?
- Do committee members attend board meetings?
- Is the branch represented at regional meetings?

## Branch information and communications

- How does the branch committee communicate with members? Is PPTA information displayed, publicised and discussed by members?
- Is there a PPTA notice board and a slot at staff briefing for PPTA updates and information?
- Does the branch respond in a timely manner to requests for information from the union, such as surveys and elections?
- Do branch officers feel confident finding relevant information when members need advice?
- Do the branch reps have constructive relationships with the principal and board?
- Do the field office and region have up to date contact records for branch officers?

## Mahi Tika training

- Does the branch send members to Mahi Tika and other training?
- How many members have completed:
  - PCT (provisionally certificated teacher)
  - Stage One
  - Stage Two
  - Stage Three
- Do you have an up to date calendar for this year's courses?

## Branch issues

- Does the branch monitor conditions of employment and respond to issues?
- Does your school have a timetable policy that complies with the collective agreement (CA)?
- Are year 1 and 2 Provisionally Certificated Teachers receiving their correct non-contact entitlements?
- Do all other members have their correct entitlement of non-contact time?
- Are MMAs allocated according to the provisions of the CA?
- Are units allocated according to the provision of the CA?
- How many members are on fixed term contracts? Do appointment letters for non-permanent staff meet the requirements of the CA and the Employment Relations Act?
- Are members reimbursed as per the CA when attending school camps and call back days?
- Is the service increment widely publicised amongst the membership?
- Are staff consulted about issues affecting them?



## Acronyms

<b>ASTCA</b>	Area Schools Teachers' Collective Agreement
<b>AO</b>	Advisory Officer (PPTA)
<b>BOT</b>	Board of Trustees
<b>CA</b>	Collective Agreements
<b>CAPNA</b>	Curriculum and Pastoral Needs Analysis
<b>FO</b>	Field Officer
<b>GMFS</b>	Guaranteed Minimum Formula Staffing
<b>HSWA</b>	Health and Safety at Work Act
<b>MBIE</b>	Ministry of Business Innovation and Employment
<b>NET</b>	Network of Establishing Teachers
<b>NZTC</b>	New Zealand Teaching Council
<b>PPTA</b>	Post Primary Teachers' Association
<b>PUM</b>	Paid Union Meeting
<b>STA</b>	School Trustees Association
<b>STCA</b>	Secondary Teachers' Collective Agreement

## Links

PPTA	<a href="http://ppta.org.nz">ppta.org.nz</a>
Employment NZ	<a href="http://employment.govt.nz">employment.govt.nz</a>
Healthcare Plus	<a href="http://healthcareplus.org.nz">healthcareplus.org.nz</a>
Education Gazette	<a href="http://gazette.education.govt.nz">gazette.education.govt.nz</a>
Ministry of Education (MOE)	<a href="http://education.govt.nz">education.govt.nz</a>
Council of Trade Unions (CTU)	<a href="http://union.org.nz">union.org.nz</a>
Teaching Council	<a href="http://educationcouncil.org.nz">educationcouncil.org.nz</a>
Worksafe NZ	<a href="http://worksafe.govt.nz">worksafe.govt.nz</a>

## Useful tool kits at [ppta.org.nz](http://ppta.org.nz)

Search for

- Education change management tool kit
- It's About Time – time table tool kit
- Professional Learning and Development tool kit

## Important dates for PPTA branches

31 January	Financial year ends for branches and regions.
1 February	PPTA year begins. Branch officers should be in place.
February	Completed branch directory forms should be sent to the PPTA field office.
February	Mahi tika dates circulated to branches.
Feb/March	Branch officers' training held.
15 March	Last date for sending names of branch chair to field office. Branch financial statements should be completed and sent to the regional treasurer.
31 March	Financial year ends for PPTA national office.
Last Monday of term 3	Closing date for executive nominations.
Week 1 & 2 of term 4	Voting closes for executive election.
Early December	Election of regional officers for the following year. Election of branch officers for following year.

## Contact PPTA

Our website [ppta.org.nz](http://ppta.org.nz) has information about PPTA activities, events, advice, publications and our positions on educational and industrial issues.

If you have a question, talk to your branch chair, a regional officer, executive member or contact your nearest PPTA field office.

### Auckland

Level 1, 4 Western Springs Road, Morningside  
09 815 8610  
[auckland@ppta.org.nz](mailto:auckland@ppta.org.nz)

### Hamilton

Level 1, 650 Te Rapa Road, Te Rapa  
07 849 0168  
[hamilton@ppta.org.nz](mailto:hamilton@ppta.org.nz)

### Palmerston North

Level 2, cnr The Square and 359 Main Street  
06 358 4036  
[palmerston@ppta.org.nz](mailto:palmerston@ppta.org.nz)

### Christchurch

Level 1, 501 Papanui Road, Papanui  
03 366 6524  
[christchurch@ppta.org.nz](mailto:christchurch@ppta.org.nz)

### Dunedin

Level 1, Queens Garden Court, 3 Crawford Street  
03 477 1311  
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