



Review of how schools are funded for
teacher aides

Sector Reference Group

Terms of Reference

May 2021

Membership updated June 2021

Background

During the investigation into the Teacher Aide Pay Equity Settlement Claim, NZEI and the Ministry identified three workforce matters (detailed in Schedule 7 of the settlement agreement) which the parties agreed to progress under the Accord process. One of these workforce matters was a review of how schools are funded for employees who routinely undertake teacher aide work, whether designated as a teacher aide or not.

Reviewing how schools are funded for teacher aides is significant and complex funding policy work. It has the potential to contribute to improved outcomes for ākonga/learners and their whānau, teacher aides, teachers and schools. This work has significant implications for all schools, and for the provision of learning support to ākonga with additional needs.

This work presents an opportunity for the Ministry and the sector to co-construct improvements to how schools are funded for teacher aides that strengthen outcomes for learners and their whānau. This work also aims to develop a fairer and more equitable system that works for ākonga Māori and better supports all ākonga (particularly those with additional needs).

Establishing a Sector Reference Group (the Group) supports the Ministry's commitment to working together with a wide range of stakeholders including principals, educators, teacher aides, boards of trustees, education sector agencies and others. It also aligns with Schedule 7 of the recent TAPEC Settlement Agreement, which outlined the use of a sector reference group to help develop, test and refine policy ideas with representation from unions (including teacher aides), principals and other key stakeholders.

The Accord partners agreed to take a joint interest-based approach to solving issues, including how teacher aides are funded. This approach allows the parties to:

- identify and deal with issues and reach consensus to resolve them
- identify the decisions the parties to the Accord can jointly or separately take, and which matters need to be recommended to Government
- actively support and recommend consensus decisions to the respective decision-making bodies of the parties.

This work contributes to the Government's objectives for the Education Work Programme by supporting:

- Barrier-free access
- Quality teaching and learning
- World class inclusive public education.

Purpose of the Sector Reference Group

The purpose of the Group is to contribute expertise and knowledge from across the education sector to inform the review of how schools are funded for teacher aides and the implementation of any changes approved by Government.

This will include working together to:

- develop a shared understanding of the key policy problems relating to a broad range of teacher aide work
- develop and test a range of policy options for addressing the problems identified
- ensure any potential policy options consider the impact for ākonga Māori
- identify potential opportunities, risks and issues and how these could be exploited, mitigated and managed
- engage and communicate with the education sector, ākonga/learners and their whānau, communities and other agencies; this includes developing and agreeing the review's engagement approach

- support policy implementation planning, design and post-implementation feedback.

This work will support the development of recommendations for the Accord Governance Group and the Minister of Education.

The Group is a key means for the Ministry to involve and work with the education sector on this issue, with broader sector engagement to follow.

Key issues and project objectives

Several limitations have been raised about the existing teacher aide funding system:

- Schools do not get predictable, dedicated funding to employ all teacher aides. The funding varies from year to year and does not:
 - automatically adjust for the impact of pay settlements, changes in their school roll or level of needs within the school
 - meet their full cost of employing teacher aides funded by Learning Support for individual students with additional needs.
- Uncertainty around future funding levels leads to job insecurity for teacher aides, hours of work that vary over time, no pay in school holidays, and limited opportunities to undertake professional learning and development.
- The nature of teacher aide funding limits system-level insights, including how well the investment in teacher aides is supporting better outcomes for students.

The review of how schools are funded for teacher aides aims to design a funding system to:

- develop a fairer, streamlined and more equitable system that works for ākonga Māori and better supports all ākonga (particularly those with additional needs), and has the confidence of principals, other educators, parents and whānau
- reduce precarity of employment and remove systemic barriers to help develop and support a well-trained, skilled and secure workforce of teacher aides able to plan and develop their careers
- improve schools' resourcing so that this is more predictable, responsive and better reflects the level and extent of need within the school
- improve teacher aide support to enable quality teaching and learning
- strengthen system-level understanding of and planning for the teacher aide workforce
- improve the quality and visibility of workforce, investment and learning support need data
- align with and support other related projects to realise their intended benefits, particularly those that are part of Teacher Aide Pay Equity Claim (TAPEC) implementation such as improving career pathways.

Project scope

The review covers all Ministry-delivered funding currently used by schools to employ teacher aides. It will consider improvements to the mechanisms for providing this funding to schools. This includes:

- operational grant funding, including Special Education Grant
- Learning Support funding provided to employ teacher aides
- specific payments made to schools to cover teacher aide wages following the Support Staff in Schools' Collective Agreement and TAPEC settlements in 2019 and 2020
- additional operational funding provided to primary schools covered by the Primary Principals' Collective Agreement whose provisional curriculum staffing entitlement is less than two full-time equivalent teachers (including the principal), to engage support staff for the following school year to make up the difference to two full-time equivalent employees (including the principal) during the school day i.e. six hours per day on days that the school is open for instruction.

The following are not in scope of this review, although any significant feedback will be passed onto the relevant team at the Ministry:

- teacher aide funding from other agencies (such as ACC or MSD) or schools' locally raised funds
- policy settings (including eligibility and funding amounts), design and operation of specific Learning Support interventions such as the Ongoing Resourcing Scheme
- issues covered by collective bargaining, such as rates of pay or hours of employment
- other workforce matters, such as career pathways and progression for teacher aides or how schools employ teacher aides (although it is recognised that how schools are funded for teacher aides can potentially support/enable or hinder other workstreams and priorities such as TAPEC implementation)
- broader funding policy

The review will be informed by NZEI Te Riu Roa's Mōku te Ao approach and align with Ka Hikitia. It is expected that any recommendations from the review will contribute to protecting, recognising and lifting up mokopuna Māori and ensuring that Māori can enjoy educational success as Māori.

Any recommendations from the review will be subject to approval by the Accord Governance Group and the Minister of Education and may also require Cabinet approval.

Chair

It is proposed that the Group has an independent chair, reflecting the diverse interests in this work and the breadth of issues that might arise.

The Chair will be appointed by the Ministry, in consultation with Accord partners. The Chair will need to be willing and able to effectively facilitate the group in both in-person and remote settings, including both settings simultaneously (i.e. where some members of the group are attending in person and others are participating remotely).

The Chair appointed by the Accord Governance Group is the Honourable Tracey Martin.

Membership

Group members are nominated for their knowledge, understanding and expertise in these key areas:

- application of the Treaty of Waitangi and tikanga and te reo Māori
- school funding mechanisms, including how the entitlement staffing part of the school resourcing system works
- schooling delivery
- diverse roles of teacher aides
- inclusive education and supporting learners with additional needs
- workforce and employment issues, including addressing gender inequality.

Group members are agreed by the Accord members and appointed by the Ministry of Education.

Responsibilities of Group members are that they:

- have the capacity and capability to fulfil the role and are fully committed for the duration stated, including being available to attend meetings¹
- provide constructive input and advice to the project
- actively assist with issue resolution

¹ The Ministry will aim to schedule meetings outside of school holidays, and with enough notice to allow members to attend.

- are committed to the project and understand the importance of their personal contribution to the project's success
- differentiate between their own views and the views of the Group or the Ministry, and will accurately report the Group's views in any wider engagement with the sector or the public
- read the meeting pack and be well prepared for meetings.

Membership may be reviewed by the Chair and the Ministry's Project Executive as work progresses to ensure the Group has the right sector knowledge, understanding and expertise it needs. Any changes to membership must be approved by Accord members.

The Group consists of:

Name	Position	Nominating organisation
Andrew Casidy	General Manager Operations, Wellington	NZEI Te Riu Roa
Paul Johnson	Principal, Central School – Te Kura Waenga o Ngāmoto, Taranaki	NZEI Te Riu Roa
Ally Kemplen	Teacher aide, Newton Central School, Auckland	NZEI Te Riu Roa
Annie Te Moana	Teacher aide, Te Kura Kaupapa Māori o Mangere, Auckland	NZEI Te Riu Roa
Jacinta Grice	Head of Department, Upland Unit, Hilmorton High School, Christchurch	PPTA Te Wehengarua
Kelvin Woodley	Principal, Tapawera Area School, Tasman	New Zealand Area Schools Association
Trudi Brocas	Principal, Central Auckland Specialist School, Auckland	Special Education Principals' Association New Zealand
Patrick Ikiua	Regional Director (Northern) – Principal Advisor Employment, Auckland	New Zealand School Trustees Association
Nathan Leith	Principal, Berkley Normal Middle School, Hamilton	New Zealand Association of Intermediate and Middle Schools
Denise Marshall	Tumuaki, Te Wharekura o Maniopoto, Te Kuiti, Waikato	Te Akatea Principals' Association
Greg Thornton	Principal, Cambridge High School, Cambridge	Secondary Principals' Association New Zealand
Perry Rush	National President, NZPF (Principal, Hastings Intermediate School, Hawke's Bay)	New Zealand Principals' Federation
Jacqui Tutavake	Tumuaki/Principal, Te Kura o Ritimana/Richmond Road School, Auckland	New Zealand Pasifika Principals' Association
Nicky Hampshire	Chief Adviser, Learning Support, Sector Enablement and Support	Ministry of Education
Paul Scholey	Chief Adviser, Education System Policy	Ministry of Education

Confidentiality and intellectual property

Group members may be presented with a range of private or confidential information, as well as data, research and analysis developed by the Ministry for topics under discussion. This will include material that is still under development, and that does not reflect either Ministry or Government policy and is not to be shared outside of the Group. Presenters will notify the group of sensitive information before presenting.

All members are expected to act professionally, respect each other's and the Government's interests, and maintain the confidentiality of information provided for their advice, comment, and critique.

All members will be required to sign a non-disclosure agreement.

Any work product developed with the Group will be the property of the Ministry.

Communication

The Chair will report against key milestones agreed with the Accord Governance Group.

The group will communicate its progress to stakeholders and managers regularly. Communications will be made jointly by the group to stakeholders. Where any group member wishes to communicate separately, they will confer with the chair.

Members of the group as well as support roles may individually discuss the work of the group and their views about the process with the leadership of their constituencies. Any comments made to their wider constituencies should remain within the messages agreed to jointly by the group.

Timeframe

The Group will be established in October/November 2020. The Group will be required through to the 2024 school year allowing for:

- options development and analysis
- implementation and engagement planning, and
- post-implementation response for rapid feedback and fine tuning.

Meetings

The Chair shall convene the Group meetings. If the designated Chair is unavailable, then the Chair will nominate another member to be responsible for convening and conducting that meeting.

The Group will meet as required by the Ministry's Project Executive with an agreed agenda and meeting focus. It is expected there will be six to ten meetings per year, with the final meeting schedule to be agreed between the Group and the Project Executive.

Meetings will either be held:

- Kanohi ki te kanohi (in person) in Wellington at the Ministry's National Office, Mātauranga House, 33 Bowen Street. The Ministry will cover all costs directly associated with hosting the meetings, including transport, catering and any other actual and reasonable expenses associated with members' attendance. This does not include professional fees.
- Remotely using Zoom. Once the group has established relationships and norms, meetings may be held via Zoom from time to time.

If members cannot attend a meeting, they do not need to nominate or send a delegate in their place. The member can communicate with the Group and provide their views before the meeting.

Secretariat

The Group will be supported by a secretariat provided by the Ministry.

The secretariat will provide the range of organisational support and resources required by the Group to carry out its work. This includes recording in writing the Group's discussions and recommendations at each meeting.

The secretariat will distribute discussion notes to the Group within 10 working days of a meeting.

Meeting packs

All Group agenda items must be forwarded to the Secretariat within a reasonable timeframe before the next scheduled meeting. The meeting pack may include but not be limited to:

- agenda
- discussion notes from the previous meeting
- substantive research-based and policy papers for critical comment.

The Secretariat is responsible for distributing the meeting pack to the members at least five working days before the meeting.