



ANNUAL REPORT 2023

**NZEI
TE RIU ROA**



A photograph of a small, greyish-brown bellbird perched on a thin tree branch. The bird is facing right, with its head slightly turned. The background is a lush green forest with sunlight filtering through the leaves, creating a dappled light effect. The overall mood is serene and natural.

ITI KŌMAKO, TEITEI KAHIKATEA, KA TĀEA

This whakataukī, chosen for Hui-ā-Tau this year, speaks of aspiration and persistence. The bellbird is one of the smallest birds in the forest, yet it is capable of reaching the top of the kahikatea, the tallest tree in the forests of Tāne.

WHO WE ARE

NZEI Te Riu Roa is the union of more than 50,000 principals, teachers, support staff and specialist staff working in primary, area and secondary schools, early childhood centres, Ministry of Education Learning Support and school advisory services. We operate from a national office in Wellington and 12 regional offices across the country.

The NZEI Te Riu Roa vision is to be the most powerful education union in New Zealand. Our mission is to advocate for a strong, vibrant and well-resourced public education system where all tamariki can reach their full potential.

MŌKŪ TE AO

Mōkū te Ao is the way NZEI Te Riu Roa drives change in the education system to one based on Rangatiratanga so that it leads to success for tamariki Māori. What is good for Māori is good for everyone.

Mōkū te Ao is based around eight Pou and is a Māori first approach. It is a part of how we empower our members and staff to work towards system change.



NGĀ POU THE VALUES THAT GUIDE OUR WORK

Whakamana

Honouring identity, language and whenua to give power and authority to others by maintaining Mana

Whanaungatanga

Obligations based on relationships linking individuals to generations based on kin and non-kin and built on experience and place which is in practice whakawhanaungatanga

Rangatiratanga

The right to autonomy by controlling your own aspirations and destiny

Whakapapa

Geneology, lineage, descent, kinship and status

Manaakitanga

Duty of care to support and uplift others with kindness, generosity and respect

Wairuatanga

The spiritual dimensions of thinking, being, doing and connecting through time and space

Kaitiakitanga

A connection between human kind and the natural world which is a role of guardianship

Tikanga

To follow tikanga is to follow processes that are right and based on rites

NZEI Te Riu Roa

Area Councils

Branches

Aronui Tōmua

Komiti Pasifika

AC TE PĪPĪRI MANANUI O NGĀ TĀTAHA A MĀUI COMPRISES OF ARONUI TŌMUA 1-13

- AT-1 Te Hiku o te Ika
- AT-2 Hokianga ki Taumarere
- AT-3 Manaia ki Tutamoe
- AT-4 Tāmaki Makaurau
- AT-5 Manukau Whānui
- AT-6 Te Mangai Maori Waikato
- AT-7 Tauranga-Moana
- AT-8 Te Rohe Pōtae
- AT-9 Tokoroa
- AT-10 Rotorua
- AT-11 Mataatua
- AT-12 Manaakitia o Opotiki
- AT-13 Te Whānau a Apanui

AC WAIKATO

- BR Cambridge
- BR Central King Country
- BR Coromandel Peninsula
- BR Huntly
- BR Maniapoto
- BR Matamata
- BR Thames
- BR Tokoroa
- BR Waihi
- BR Waikato
- BR Waipa

AC TARANAKI

- AT-14 Parininihi ki Taipake
- BR North Taranaki
- BR South Taranaki

AC AUCKLAND CENTRAL

- BR Auckland
- BR Hibiscus Coast
- BR Komiti Pasifika - Auckland
- BR North Shore
- BR West Auckland

AC COUNTIES MANUKAU

- BR Franklin
- BR Howick
- BR Manurewa
- BR Otahuhu
- BR Papakura
- BR Papatoetoe
- BR Waiuku

AC TE HAUNUI CENTRAL

- AT-15 Ruapehu
- AT-16 Whanganui
- AT-17 Manawatū
- BR Feilding
- BR Horowhenua
- BR Manawatu
- BR Rangitikei
- BR Taihape
- BR Whanganui

AC TE TAU IHU O TE WAKA A MĀUI

- AT-24 Whakatu-Motueka-Mohua
- BR Buller
- BR Golden Bay
- BR Marlborough
- BR Motueka
- BR Nelson

AC OTAGO

- AT-26 Otepoti
- BR Central Otago
- BR Otago
- BR South Otago
- BR Waitaki

AC WAITAHA

- BR Ashley
- AT-25 Waitaha
- BR Christchurch
- BR Ellesmere
- BR Grey
- BR Hurunui
- BR Mackenzie
- BR Malvern
- BR Mid Canterbury
- BR South Canterbury
- BR Te Tai o Poutini

AC TE TAI TOKERAU

- BR Bay Of Islands
- BR Far North
- BR Hokianga
- BR Kaipara
- BR Northern Wairoa
- BR Rodney-Otamatea
- BR Whangarei

AC BAY OF PLENTY

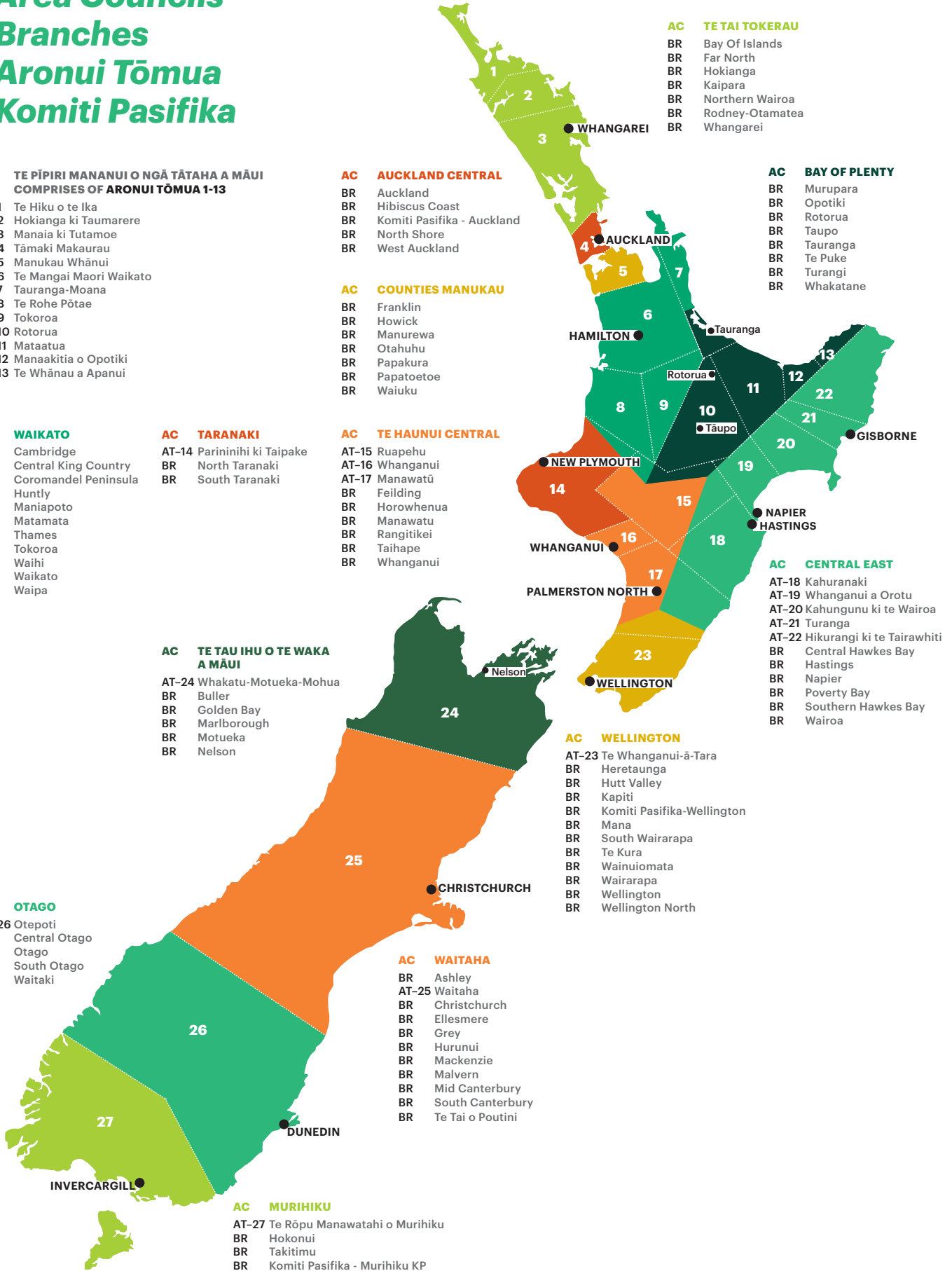
- BR Murupara
- BR Opotiki
- BR Rotorua
- BR Taupo
- BR Tauranga
- BR Te Puke
- BR Turangi
- BR Whakatane

AC CENTRAL EAST

- AT-18 Kahuranaki
- AT-19 Whanganui a Orotu
- AT-20 Kahungunu ki te Wairoa
- AT-21 Turanga
- AT-22 Hikurangi ki te Tairāwhiti
- BR Central Hawkes Bay
- BR Hastings
- BR Napier
- BR Poverty Bay
- BR Southern Hawkes Bay
- BR Wairoa

AC WELLINGTON

- AT-23 Te Whanganui-ā-Tara
- BR Heretaunga
- BR Hutt Valley
- BR Kapiti
- BR Komiti Pasifika-Wellington
- BR Mana
- BR South Wairarapa
- BR Te Kura
- BR Wainuiomata
- BR Wairarapa
- BR Wellington
- BR Wellington North



NGĀ INGOA MĀORI O NZEI TE RIU ROA

Te Riu Roa

The long valley where cliffs, waterfalls, and streams are challenges just as new knowledge and experiences are challenges. The flow of water is symbolic of education being an ongoing, lifelong process and the valley allows for the information to roll down the valley and echo back up.

(Andy Sarich, Taitokerau Kaumatua)

Miro Heretangata

miro: strand/thread

here: to tie/join

tangata: people

The tying or joining together of the threads, the members of NZEI Te Riu Roa.

(Iria Whiu, Ngāi Te Rangi, Past President of NZEI Te Riu Roa)

Miro Māori

The Māori strand/Māori membership of NZEI Te Riu Roa.

Mātauranga Tūhāhā

Mātauranga: Māori knowledge

Tū: the development of the tamaiti

hā: the growth of the tamaiti

hā: the development and interaction of the tamaiti with others within their environment

Mātauranga Tūhāhā is an indigenous framework developed by Miro Māori members.





Above: NZEI Te Riu Roa Te Reo Areare, front row (L-R) Koro Alexander Waihirere, Raewyn Himona, Paeone Goonan, Ripeka Lessels, Te Aroha Hiko, O'Sonia Hotereni; middle row (L-R) Rongopai Kira, Winnifred Morris, Natasha Hape, Lisa Johnston, Lovi Collier, Jayne Matetaka, Tiri Bailey, Max Thompson; back row (L-R) Takarihi Temarama, Annie Te Moana, Barney Manaia, Maihi Parkinson, Tania Urwin.

Top: NZEI Te Riu Roa National Executive, front row (L-R) Ally Kemplen, Ripeka Lessels, Mark Potter, Liam Rutherford, Phonderly Siohane; middle row (L-R) Paul Johnson - resigned (replaced by Virginia Oakly), Barb Curran, Winnifred Morris, Paeone Goonan, Raewyn Himona, Conor Fraser, Sandie Burn; back row (L-R) Martyn Weatherill, Annie Te Moana.



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President's Report

*Whāia te mātauranga hei oranga mō koutou
(Seek after learning for the sake of your wellbeing)*

It is with a deep sense of gratitude and privilege that I present the annual report for NZEI Te Riu Roa. As Te Manukura, I am humbled by this extraordinary workforce that represents diverse groups across the education landscape.

Throughout this Maramataka year, our members have exhibited unwavering dedication, going above and beyond their call of duty. They have tirelessly engaged in industrial campaigns, negotiations, and extended their efforts to support struggling tamariki and their communities amidst the escalating complexities of social and economic challenges throughout the Motu.

In every sector of our union, individuals have made invaluable contributions in various capacities. Whether as principals, teachers in the compulsory or early childhood sectors, specialist educators, support staff, librarians, or administration personnel, their collective efforts have added immense value to schools, kura, learning centres, and beyond.

As I reflect on the progress made during these challenging times, a sense of satisfaction envelops me. Our collective agreement campaigns have yielded significant wins, marking historic improvements. We have achieved full parity funding for ECE kaiako, cultural allowances for kindergarten teachers, established pay equity for more support staff, and secured increased classroom release time for primary teachers. We also made a significant win in recognising the work of small school principals by campaigning for, and winning, an increased pay grade.

This year, the harsh reality of climate change has emerged. Changes in storm activity originating from the Pacific have resulted in inundation affecting over 60% of our population. Cyclones have ravaged many of our members' lives, damaging or displacing their workplaces, homes, and sources of income. Our communities, including marae and kohanga reo, have suffered significant losses due to floodwaters.

The governance within our union is undergoing a transformative process. The governance of our union is undergoing transformative change as we are committed to fostering a governance structure based in Te Tiriti, one that embraces a Te Ao Māori context and method of operation in decision-making and collaborative efforts. This process will involve an evolving understanding of integrating the spheres of leadership in both Te Ao Māori and Te Ao Pākehā.

I extend my deepest appreciation to all our members, partners, and staff who have shown unwavering support throughout all this activity. The contents of this report stand as a testament to the resilience, determination, and commitment of our education community. Together, we will continue to navigate the complexities of our time, championing excellence in public education and fostering a brighter future for all.

Mark Potter

*Te Manukura,
NZEI Te Riu Roa*





National Secretary's Report

Ka mahuta a Matariki i te pae, ka mahuta ō tātou tūmanako ki te tau

When Matariki rises above the horizon, our aspirations rise to the year ahead

I'm writing this the day after our second national Matariki holiday sets us on the course for the new Maramataka year.

Matariki reminds us to think back and plan forward, and that's exactly what this annual report and our collective gathering together at Hui-ā-Tau aims to do too. They're ways to help us think about our many achievements and whether we have built a stronger sense of being "in union" across our sector. Compared with a year ago, do we think more members feeling "in union"? Are more of us confident to use our voices to effect change? Do we feel more powerful as a collective group of union members?

These are key questions to consider as we plan for the new Maramataka year, and while the answer in my mind is a qualified "yes", there is always more work to do!

As workplace leaders, you were critical to encouraging more than 5000 of your colleagues to join the union in the first half of 2023 – whether that was in support of our Fair Pay Agreement claims, our schooling and kindergarten negotiation campaign or our first ever Evolve/Lollipops collective agreement claim in the private ECE sector.

We know that during the Covid-19 pandemic, many beginning teachers in particular did not have the opportunity to join the union and have been facing steep cost of living challenges. Some members have felt that

new members have not made the investment of time and money in the union that they have. But if we really believe in building power by joining together collectively, we cannot and should not turn away anyone who wants to become a union member at any time. Our job as unionists is to meet people where they are, and then invite them on the journey to union activism. A union is its members, and the power of the union comes very significantly from its numbers. Ultimately, the reason we can affect change as educators is because we are a powerful union with a strong, vocal membership.

In terms of growing our "voice", we've seen member leaders step up and lead strike events, paid union meetings and zooms in every town and city, often at very short notice, across the motu. We have staunch new leaders speaking up in Lollipops centres as they move toward their historic first collective agreement. We have a kaiako Māori rōpū in kindergarten and a national kindergarten touchstone group that has gone from strength to strength. There's a stunning bunch of new educators leading and challenging in our Te Kupenga Rangatahi network. The National Executive and Te Reo Areare have been on a journey together exploring partnership in shared decision making. And many of you, as workplace leaders, will have experienced the strong sense of unity on our biggest ever strike day in March... but we have also heard the frustration and anger that some members felt when collective agreement settlements did not "fix" all the problems we face. There is still work to do!

I'm confident that the mahi and commitment members have shown over the past 12 months is a strong foundation for the next year as we continue to build our power to achieve the changes in education that we all want to see.

Stephanie Mills

*Korimako Tangiata,
NZEI Te Riu Roa*

OUR YEAR

AT A GLANCE





2022

July

Historic move by teachers in private early childhood centres

Evolve union members seek full pay parity (with kindergarten teachers) for their qualified teachers and leaders, the living wage for support staff, more non-contact time and better teacher: child ratios.

Worrying trend in pool of reliever teachers continues

Primary school principals warn disruptions to children's learning will continue over the term. New analysis from NZEI Te Riu Roa shows the chronic shortage of relief teachers is the continuation of a worrying long-term trend requiring urgent attention.

August

Education funding must be inflation-proof for our tamariki

Educators call on the National Party to explain how cuts to education spending at a time of significant pressure on tamariki will not further compromise their learning.

Disappointment at decision not to fund pay parity

NZEI Te Riu Roa express disappointment at reports the Government failed to fully fund pay parity for early childhood teachers in the 2022 Budget in an effort to save money.

October

School and kindergarten teachers and principals call union meetings, urge swift response from Government to claims for pay improvements, staffing and working conditions

Tens of thousands of primary and early childhood educators ready themselves to take action to speed up the settlement of their collective employment agreements and secure a commitment to fixing the under staffing that affects the quality of education our tamariki receive.

New NZEI Te Riu Roa president driven to improving children's education

Mark Potter, the principal of Berhampore School in Wellington, is elected to the position of NZEI Te Riu Roa president at the end of the country's largest education sector union's annual conference in Rotorua, hui ā tau.

Four pay equity settlements, up to 79 percent pay rises – a legacy of 50 years of the Equal Pay Act for the education sector

NZEI Te Riu Roa welcomes pay increases of up to 79 percent for some members, as the union marks the 50th anniversary of the Equal Pay Act 1972 on 20 October.

New evaluation of school learning support roles points to need for more of them

A new evaluation of school learning support roles shows tamariki are missing out on getting the learning support they need to thrive. NZEI Te Riu Roa say only 2 in 5 schools can access learning support coordinators and the evaluation should unlock funding for more of them.

November

NZEI TE Riu Roa educators to discuss employment offer, further action

Tens of thousands of principals and teachers in primary, area schools and kindergartens attend union meetings over three weeks to demand collective employment agreement offers from the government.

December

Kindergarten teachers reject Government offer

Thousands of kindergarten teachers from across Aotearoa reject their collective agreement offer from the Ministry of Education and kindergarten associations.

NZEI Te Riu Roa welcomes increase to pay parity funding

NZEI Te Riu Roa welcomes the 4.5% increase to pay parity funding for ECE centres announced by the Minister of Education, but says for full pay parity to be delivered the funding system needs an overhaul.



Above: Primary school teachers and principals, kindergarten teachers, and area school principals take strike action in March 2023.

2023

◀ January

Cost of living still above any potential pay offer

Cost of living pressures remain a key concern for kindergarten and primary teachers and principals as they grapple with a Government offer to settle their collective employment agreements.

February

Report shows how tough Covid-19 was for children, educators

The Quality Public Education Coalition reports the effects of the Covid-19 pandemic on students show the need for a systemic overhaul of primary education's funding and staffing models.

Pay equity delivers up to 40% pay increases for school librarians and science technicians

Members of NZEI Te Riu Roa negotiating on behalf of school librarians, library assistants and science technicians announce that proposed pay equity settlements are ready to be voted on by their colleagues.

March

30,000 teachers to strike on 16 March 2023

Around 30,000 primary school teachers and principals, kindergarten teachers and area school teachers and principals take strike action with PPTA colleagues on Thursday 16 March 2023.

April

Principals vote in favour of a work ban

Primary and area school principals across Aotearoa New Zealand vote in favour of a work ban until they receive an offer from the Ministry of Education that addresses their ongoing serious concerns.

Area school teachers to vote on move to industrial action in term 2

Area school teachers across the country vote on whether to move to industrial action, including taking rolling strikes, after receiving one offer back in December 2022.

Pasifika Fono – Leading with Change

Pasifika educators met in Wellington to consider how our education system could be redesigned to be more responsive to Pasifika learners. The theme was: “we look to the horizon for new ways of moving forward whilst keeping both the past and the present at the forefront of our minds and actions”.

May

Fair Pay Agreement process kicks off for early childhood sector

A Fair Pay Agreement process for the early childhood sector kicks off after more than 5000 workers sign in support of it. Over 30,000 early childhood kaiako and kaimahi are now covered by NZEI’s FPA claim that sets out consistent pay and working conditions across the entire sector.

NZEI Te Riu Roa Area school teachers to join rolling strike action

Area school teachers across the country vote in favour of taking industrial action, including rolling strikes, a relief teacher work ban, a ban on meetings outside of school hours, and rolling strikes from Tuesday 9 May to Thursday 11 May.

Primary school teachers reject 3rd offer

Primary school teachers vote to reject their 3rd offer from the Ministry of Education, reflecting frustration that the pressures faced in the classroom and from the cost of living crisis is not being adequately recognised by the Government.

Right: Educators gather at the annual Pasifika Fono.

Kindergarten teachers accept latest collective agreement offer

Kindergarten teachers vote to accept their latest collective agreement offer, which include several significant gains for teachers including a sick leave increase to 15 days, a cultural allowance for kaiako Māori, and an increase to head teacher professional time.

Disappointing Budget for primary educators

NZEI Te Riu Roa announce the 2023 Budget has disappointed primary educators. School funding has failed to keep pace with CPI, with no investments in teacher pay, additional teacher staffing or specialist staff for the second year in a row.

ECE focus should be on lower ratios and better pay

NZEI Te Riu Roa welcomes the extension of 20 hours early childhood education (ECE) to two-year-olds because it means greater equity of access for tamariki and their families.

June

Primary school teachers accept 4th collective agreement offer

Primary teachers vote to accept the fourth Ministry of Education collective agreement offer put to teachers. It follows a long negotiation campaign which included the largest education strike in this country’s history.

Principals accept MoE offer

A majority of primary principals voted to accept the third Ministry of Education offer for the Primary Principals’ Collective Agreement in an independent secret ballot. Principals will use the new two-year term to continue our mahi leading the primary education sector of Aotearoa.



How we support our members

Manaakitanga

Our support centre answered 23,239 total calls between 1 July 2022 and 30 June 2023, with three most queried topics being bargaining, holidays and leave, and industrial action.

Member Assist

Members continue to provide one-to-one support for their colleagues who are working through issues that impact on their work. Referrals, whether self-referrals or through other union structures, have been quieter over the last 12 months, which has also meant less development for the team has happened. A survey of all Member Assist was completed in the first quarter of 2023, and the results from this will be used to revitalise the support and the team.

Member education

Workshops, hui, seminars, conferences all provide opportunities for professional and union organising development – both online and kanohi-ki-te-kanohi.

Over the last 12 months regular events like branch and area council meetings, national leadership group hui, Te Kupenga Rangatahi activist hui, the rural and teaching principals conference, Pasifika fono, Te Kāhui Whetū and Hui-ā-Tau have all delivered member education. Preparing members for involvement in campaigns has included media training, facilitation preparation, lobbying and advocacy training and messaging.

A revamped worksite representative training package has started its rollout, and some regional Member Assist have participated in development.

“Sometimes it feels like it is us teachers against the world. I’ve really appreciated having you at the end of the line to talk things through. Thank you for all of your work.”



Member Benefits – HealthCare Plus

HealthCare Plus, an education union-owned not-for-profit since 1963, works to connect members with a wide range of financial, physical and mental wellbeing partners. Members of HealthCare Plus can participate in monthly online webinars, access discounts and benefits, and apply to Grants for Good for funding for education-related programmes. <https://healthcareplus.org.nz/>

Campaigning

Campaigning focused on several collective agreements that were up for renewal and standing together our collective efforts, including the largest education strike in this country’s history, saw significant pay improvements and historic movement on conditions.

Whanaungatanga

Our network groups Te Kupenga Rangatahi (New Educators Network), Rainbow Community, Miro Māori, and Pasifika Network create points of connection.

Legal Support

The legal and industrial team provides advice and advocacy for individual members to ensure that they are fairly treated by their employers and by their professional bodies.

Having Our Say

Together with our members we made ten submissions to Parliament and other agencies on important issues such as the Teacher Aide Funding Review, the Companies (Directors Duties) Bill, Education and Care Funding Review, and Professional Disciplinary Processes and Competence Evaluation Processes for the Teaching Profession.

Ako

Our biannual journal *Ako* covered important issues like the future of initial teacher education and inclusive education, teaching climate action, changing practices since Covid, language learning and how educators learn including examples and outcomes of professional development. The last print issue of *Ako* journal was distributed in February 2023. Going forward it will be an online-only journal available to read at Akojournal.org.nz.

Connections

NZEI Te Riu Roa is affiliated to the New Zealand Council of Trade Unions (CTU), and is a member of Education International; we work closely with Council of Pacific Education. Our members views are represented on a day to day basis by our elected officials and staff who engage with the Ministry of Education, the PPTA, the Teachers’ Council, ERO, the Principals’ Federation and the School Trustees Association.

“Sometimes it is just a question of talking things through with an experienced advisor.”

OUR IMPACT



A large, dense forest with a prominent tree in the foreground. The tree is tall and has a thick trunk, with a large, spreading canopy of green leaves. The background is a vast expanse of similar trees, creating a deep green, textured landscape. The lighting is soft, suggesting a misty or overcast day.

Te Tiriti o Waitangi

The structures of NZEI Te Riu Roa have been premised on Te Tiriti o Waitangi and the tongi:

Kotahi te kōhao o te ngira e kuhuna ai Te miro ma, te miro pango me te miro whero (Potatau Te Wherowhero)

There is but one eye of the needle through which all must pass

The white, the black and the red thread.

NZEI Te Riu Roa provides pathways for member participation through its structures. Te Tiriti demands that parties work closely together for one purpose based on respect and trust (Part 2 NZEI Te Riu Roa Rules).



Wāwāhi Tahā | Time for tamariki

Primary teacher campaigns

The past 12 months have been dominated by collective agreement negotiations between NZEI Te Riu Roa and the Ministry of Education.

Primary teacher negotiations began mid-2022, followed by a vote to join whole of public sector negotiations across health, education, government and social services in July. Primary teacher members sought a pay increase to address the cost of living crisis and recognition of increased job demands.

First offer

After thousands of members attended paid union meetings, a first offer was received late in 2022 which was rejected by members. Liam Rutherford, the NZEI Te Riu Roa President at the time, said, “the steep rise in the cost of living and increasing job demands on educators have taken their toll on educator wellbeing”.

The offer proposed disestablishing resource teacher of Māori positions. National Executive, Te Reo Areare, negotiations teams, resource teachers, and members united to condemn the proposal, prompting the Ministry to withdraw it.

Second offer

A second offer was an improvement on the first with significantly more classroom release time, but didn’t address members’ increasing cost of living concerns, and was also rejected. Primary and area school teachers voted to take industrial action in a ballot in early March.

Industrial action

The strike on 16 March, held with kindergarten teachers and PPTA Te Wehengarua was the biggest education strike in New Zealand’s history. The Ministry quickly responded with a third offer.

Above: Primary teachers held a one-day national strike on Thursday, 16 March 2023 after rejecting the Government’s collective agreement offers.





Above: Teachers stand up and fight for better terms and conditions across the motu.

Third offer

Primary teacher members voted to reject the third offer, and escalate further action through strikes and an out of hours meeting ban. Members expressed frustration that classroom pressures and the cost of living crisis had not been adequately recognised.

Fourth offer

The weekend before the proposed strike date the Minister of Education intervened, and high level discussions between NZEI Te Riu Roa, PPTA, Ministry of Education and the Ministers of Education and Finance began. The talks resulted in a fourth offer that increased the pay component of the offer and better recognised the contribution of union membership.

Resolution

Members attended paid union meetings to discuss the offer before voting to accept, bringing collective agreement negotiations to an end eleven months after they began.

The settlement included some significant wins that will have long-term positive impacts for teachers – classroom release time, cultural allowances, increases to Māori immersion teaching allowance, intro of Pasifika bilingual immersion teaching allowance, improvements in sick leave, and a significant union member advantage.



Te Ao Kei Tua | Creating our future

2022 & 2023

The inaugural Tumeke Tumuaki week highlighted and acknowledged the work of principals across the country.

This year principals formed the primary principals' negotiation team, led by Lynda Stuart.

An area school principals' team has been formed and is led by Ripeka Lessels. This team works closely with PPTA.

Principals' Council conducted member engagement processes to develop a claim for negotiation teams to take forward. The claims were strongly endorsed by members in area schools and primary schools.

Principal members (both area school and primary) voted to be included in the Public Service Pay Adjustment process, but ultimately the offers that resulted from this process were rejected by principals.

Emergency weather events in the early part of 2023 impacted on principals' meetings, but they quickly moved to online processes with high levels of participation during civil emergencies – demonstrating the commitment of principals to address key issues in their claims!

Principals adopted an action plan that included community and MP engagement. They also voted to take strike action with teachers (in the first strike only) and to take their own industrial action, withdrawing from engagement with the Ministry of Education and restricting their hours of work in term 2.

A crisis summit was held by the Principals' Council in June 2023 to address our recruitment and retention crisis. It was attended by representatives from national and regional principals' organisations, the Ministry of Education, NZ Teaching Council, NZ School Trustees Association and several presiding members of school boards. There was strong consensus about areas to act in, including the need to stop education being used as a political football, along with identifying several ways to improve support for principals and to make the role more attractive.



Below: Principals speak to Minister Jan Tinetti at their Crisis Summit in June 2023.





Above: Tute Mila speaking outside Parliament on the March 16 strike day.

Right: Principals' Crisis Summit makes front page of *The Post*





Ngā Aukaha | All in for tamariki

Community forums

Ngā Aukaha community forums took place across main centres in September 2022. These were the culmination of campaign activity in 2021 and 2022 and community coalition building through local reference groups. They were a key moment for our members and community allies including whānau to share how the lack of learning support is impacting our schools and centres. The forums were well attended and several MPs engaged, with strong media stories in publications like the Manawatu Standard and Nelson Mail.

Learning support collective agreements

All three NZEI Te Riu Roa learning support collective agreements have had movement in the last year, and the union's Special Education National Reference Group (SENRG) has been active in driving the strategy across these negotiations. As part of the Public Sector Pay Adjustment (PSPA) process, members at Ministry of Education covered by the Service Managers collective agreement and the Education, Communication and Behaviour Support Workers Collective Agreement voted for variations to their agreements for a two-year term, including PSPA pay increases and lump sum benefits also. Learning support field staff are at the time of writing continuing to bargain for their collective agreement which expired in January 2023. A number of members participated in the global union Organising for Power training, which set this field staff group up well.

Highest Needs Review

NZEI Te Riu Roa continues to advocate on unmet needs in learning support and the need for inclusive education through the Highest Needs Review. In November 2022, Minister Jan Tinetti released Cabinet's decisions on the Highest Needs Review at Berhampore School in Wellington, and Mark Potter, Principal at Berhampore School and then as NZEI Te Riu Roa Vice President, featured strongly in media coverage around this release – calling for funding to match the commitment to inclusive education.

Nga Aukaha National Leadership Group

For the first time, in 2023 a new National Leadership Group (NLG) was brought together for NZEI Te Riu Roa members in learning support. The group represents the full spectrum of learning support, from Ministry of Education field staff, Resource Teachers: Learning and Behaviour (RTLBs), teacher aides, early intervention, learning support coordinators and classroom teachers. The new Ngā Aukaha NLG joined those in place already for primary teachers, primary principals, early childhood education and school support staff. Given the similarity in focus, the group is also committed to working closely with SENRG, and had a joint hui in June to progress this.

Above: Community members meet with local MPs to highlight how lack of learning support is impacting schools and centres.



Mana Taurite | Pay equity

Our pay

Our pay equity claims are about addressing the historical undervaluing in both pay and status in roles that society has perceived to be 'women's work'.

Pay equity claims are a separate and different process to collective bargaining. All pay equity claims involve evidence gathering and are subject to the Equal Pay Act 1972. They are negotiated, using an interest-based bargaining approach, between NZEI Te Riu Roa and the Ministry of Education.

Below: NZEI Te Riu Roa president Mark Potter, and Secretary for Education Iona Holsted sign the Pay Equity agreement for Support Staff Admin & Kaiarahi i te reo.



Therapists' pay equity campaign

NZEI Te Riu Roa and the Ministry of Education are currently working on the therapists' pay equity claim. We are at the assessment stage and looking to enter negotiations before the end of the year.

This claim covers both Ministry and school board-employed (mostly in specialist schools) speech language therapists, occupational therapists, physiotherapists and music therapists.

Teachers' pay equity claim

This is well underway with more than half the interviews with teachers done. This is the biggest claim NZEI Te Riu Roa has made. The scope of the claim includes teachers from early childhood to secondary and covers the diverse roles done by teachers in these areas. It involves working with groups such as private early childhood employers and the PPTA Te Wehengarua.

Other claims underway

These include – education advisors; service managers; administrators and other auxiliary staff in kindergartens; and educational psychologists.

From July last year (2022) we have settled these claims:

- Administrators in schools
- Kaiārahi i te reo
- Librarians
- Science Technicians

All of these groups have had significant pay corrections to remedy gender-based undervaluation – in some cases 40 to 79%. Other non-remuneration aspects were also part of the settlements such as an examination of professional learning and development and career pathways.

Left: Attendees celebrate the signing of the Pay Equity agreement at Berhampore School in Wellington.

ECE Voice

Evolve

This year started with a group of members initiating bargaining with Evolve, one of the largest ECE providers in the country. An open letter to the company showing support for a collective agreement gained 500 signatures and was presented at the first bargaining round in March. A further bargaining round was held in April. The board has now stalled on presenting an offer. The first ever paid union meetings at a private company of this scale were held in June and July, some during contact hours.

Fair Pay Agreements

One of the most significant moments in ECE over the past year was the Fair Pay Agreement (FPA) legislation being passed into law. Throughout consultation, NZEI Te Riu Roa members attended rallies in support and made submissions to the Select Committee.

Dozens of union members packed out the public gallery in late October 2022 when the law was passed. Signatures supporting an FPA began to be gathered online and in January, NZEI Te Riu Roa staff and members undertook a blitz of ECE centres across the country.

The purpose was to gain signatures, recruit members and spread the word on what these

agreements could do for the sector. These visits were largely made to community based ECE services. 368 sites were visited, 938 FPA sign-ups and 88 new members were gained.

At Te Kōhanga Reo visits kaiako and kaimahi said they would discuss the fair pay agreements at their whānau hui and takawaenga committed to attending hui in sites to continue the conversation.

NZEI Te Riu Roa marked the ECE Fair Pay Agreement application on May 1st at an event in the offices at Te Whanganui-a-Tara. Since then, we launched a survey of the ECE sector to find out the main issues that kaiako and kaimahi want to address through the fair pay agreement process.

“People who work in ECE care very deeply about children – that’s why we’re pushing for fair pay agreements that will enable teachers to provide the best quality early childhood conditions and education.”

– NZEI Te Riu Roa member, Catherine Vaughan



Left: Parent Marika Pratley and MP Ibrahim Omer at the launch of the Early Childhood Fair Pay Agreement.

2022 winter

The 2022 winter was a tough one for ECE workers as they battled sicknesses after the Covid-19 restrictions of the previous years. NZEI Te Riu Roa advocated for and supported members to work out what leave they were entitled to.

Kauri Kids

When Auckland Council proposed to cut funding by closing Kauri Kids early childhood centres the ECE Voice team pushed back. Rallies were attended alongside members and parents. NZEI Te Riu Roa made a budget submission highlighting the importance of low-cost high quality centres such as Kauri Kids. The budget proposal passed by Auckland City Council did not recommend the closure of the centres, but we will continue to watch this space.

Kindergarten

Kindergarten teachers have been very active over the last year with the negotiation of a new collective agreement.

A hui was held at Horouta Marae in October 2022 and hosted a number of kindergarten kaiako Māori from across the country to determine their claim for a kaiako Māori allowance. They discussed what the claim should look like and the methods for organising to achieve this. It was a first in ECE and has set us up to grow Māori leadership across early childhood.

After rejecting an offer on their collective agreement in late 2022 members joined strike action on 16 March. This was the first time kindergarten teachers have joined strikes with their primary colleagues, and the first strike kindergarten teachers have participated in since 2005.

Over the course of the bargaining, kindergarten teachers have mobilised themselves, growing participation and leadership across actions including phone trees, photo postering and petitions to support their claims and their colleagues. In addition to their strikes and actions, kindergarten teachers took their first ever paid union meetings during their contact hours, mobilising significant numbers of members to walk out of their workplaces to discuss and vote on their contract negotiations.

Following the strike, the new collective agreement offer accepted by members, came with an increase to sick leave days, a cultural allowance for kaiako Māori and increases to head teacher professional time. The cultural allowance was momentous as it is the first recognition for kaiako Māori in kindergarten, an allowance that is already recognised in primary and secondary schools.

Budget 2023

Budget 2023 brought ECE sector wins including funding for full pay parity at kindergarten funding rates. NZEI Te Riu Roa who have been fighting for full pay parity for early childhood for decades.

Other wins included an extension of 20 hours free funding to 2-year-olds, additional funding for Māori and Pacific bilingual and immersion services and \$1.8 billion committed overall to the ECE sector.

“A dear friend wrote me a whakatauki for the process: ‘Kapohia te toi runga’ which means ‘to strive for excellence in all we do’. Kaiako Māori can now feel valued and respected in their mahi.”

– Kindergarten teacher and negotiating team member, Reweti Elliott.



New Educators

Bringing new perspectives

In December 2022, two Te Kupenga Rangatahi members spoke at the AEU New Educators conference in Perth. They shared their experiences of what it means to put Māori first from a union perspective and a new educator perspective.

Te Kupenga Rangatahi Activist Hui

This year's Te Kupenga Rangatahi Activist Hui took place in May. The theme was Mōku te Āo and the hui focused on the connectedness of values-based kaupapa to make collective change for our tamariki and communities. Six member leaders, from Miro Māori and Komiti Pasifika, held the space for Te Kupenga Rangatahi.

All in Day events

Waikato and Manawatū events continue to run. These are initiated by primary Beginning Teacher (BTs) members to learn about the Aotearoa NZ Histories' Curriculum. Navigating curriculum changes as a collective has allowed BTs the time and space to get through them together. Attendances ranged from 30–70 per session.

Fair Pay Agreements

From June 2023, Te Kupenga Rangatahi members worked on our Fair Pay Agreement campaign in Auckland and Wellington. The members took the opportunity to bring together kaiako and kaimahi in the ECE sector – especially students who relieve and work as unqualified staff on minimum wage.



“Kia ora whānau! I felt such a strong sense of whānaungatanga during our hui, it was incredible to be surrounded by so much mana and tautoko. Felt very proud to be a part of this event with so many strong and educated kaiako.”

– Sarah Davel, ECE Student Kaiako from Te Whanganui-a-Tara



Above: The annual Te Kupenga Rangatahi Activist Hui hosted at Te Kura Kaupapa a rohe o Māngere.



KŌKIRIHIA

The plan for removing streaming from our schools

TOKONA
TE RAKI
Māori Future Makers

Professional work

Kōkirihiā

NZEI Te Riu Roa has been an active participant in the sector wide effort to remove streaming and ability grouping from Aotearoa New Zealand's classrooms. The project is led by Ngāi Tahu social innovation hub Tokona Te Raki and was commissioned by both the Ministry of Education and the Mātauranga Iwi Leaders Group. Following a stakeholder hui in May 2021, a design team was assembled and began meeting regularly from October 2021.

The outcome of the design team's efforts is *Kōkirihiā: The plan for removing streaming from our schools*, a beautifully designed blueprint for ending streaming and ability grouping in Aotearoa New Zealand's schools that was released in March 2023. Kōkirihiā includes a staged plan to end these practices by 2030, as well as position statements and commitments from the organisations involved. As per our commitments in Kōkirihiā, NZEI Te Riu Roa begin wānanga with members in August 2023.

Teacher Aide Funding Review

Consultation on the proposed funding model closed in April. NZEI Te Riu Roa members efforts to encourage their colleagues to submit contributed strongly to the 1300 submissions received. Just under half (49%) of all submissions received were from NZEI Te Riu Roa members.

The funding review sector reference group was paused while the principal work ban was in place, but the group will meet again to consider consultation feedback before delivering its final report.

Learning support for Ākonga Māori

The Māori Affairs Select Committee has conducted an inquiry into learning support for Ākonga Māori. An immediate outcome was that the Government included funding for learning support roles in Māori immersion in Budget 2023.

Mātauranga Māui Climate Change

Pacific Climate Action

In May, members Rongopai Kira and Liam Rutherford attended the Education International Educators for Climate Justice and Just Transition Conference in Fiji. The purpose of the event was to push the climate justice and just transition agenda within the education sector. Rongopai and Liam presented on a session focused on organising NZEI Te Riu Roa members around climate change through our Mātauranga Māui programme. The outcome of the hui was the development of nation plans that will be reviewed in 12 months' time.

Carbon emissions verification

NZEI Te Riu Roa carbon emissions were first independently verified by McHugh & Shaw Limited in February 2023. In June 2023, the National Executive endorsed a carbon footprint reduction strategy based on science-based targets. This is a part of honouring Ngā Pou. We are one of the first unions to create a climate action programme.

In September 2023, a one-day symposium will be held in Tauranga discussing the impacts on education of sea level rise and coastal flooding, and understanding how education communities can respond proactively and constructively to this.



Below: Leaders of Education International and the Council of Pacific Education meet to highlight the current Go Public! Fund education campaign.



Te Reo Areare Report to Te Kāhui Whetū and Hui a Tau 2023



Transformation Mōkū te Ao

Using Mōkū te Ao we drive change in the education system to ensure it sets tamariki Māori up for success. Because what's good for Māori is good for everyone.

Doubling our power by growing member numbers and increasing our activism means we can build back better and advocate for transformative system change.

Our collective Rangatiratanga led to widespread support to end streaming and ability grouping. Whakamana kaiako, whakamana tamaiti.

Governance

As required by recommendations from Hu-ā-Tau, this kaupapa is being thoroughly investigated and it raises some important questions. Where does Te Tiriti o Waitangi, Te Tongi and Mōkū te Ao fit in the ensuing deliberations? Do the present governing structures of NZEI Te Riu Roa need to change?

Relationship with Te Huarahi (PPTA)

Te Huarahi Wehengarua and Te Reo Areare gathered for whakawhanaungatanga and worked through items of mutual interest.

The review of Te Marautanga o Aotearoa generated interesting and contrasting views and the groups agreed to forward them to Te Mahau for consideration.

Mātauranga Māui

We use our pepeha — to create strong foundations for our Mātauranga Māui climate action strategy based around the framework of 'observe, assess and act.' The strategy was received with interest and enthusiasm and raised the following important questions:

- Who can assist when action needs to be taken?
- What needs to happen to enhance your pepeha?
- What are our iwi obligations?
- Is your marae insured?
- How can we ensure that this happens?

Primary Teachers Collective Agreements

Reaching a formal agreement with the Ministry of Education was a lengthy process which saw four offers received and the largest education strike in the history of Aotearoa before settlement in June.

Member participation and activism during these months was high and members engaged and organised through online webinars, zoom meetings, and face to face conversations. "Around the Kohua" online korero encouraged members to share their stories.

Resource Teachers of Māori Positions

In November 2022, the Ministry of Education presented a proposed collective agreement to the Primary Teachers Collective Agreement negotiations which included "disestablish[ing] Resource Teachers of Māori".

Members of the education sector and NZEI Te Riu Roa spoke publicly about their concerns, citing a breach of te Tiriti o Waitangi, and after a concerted effort from NZEI Te Riu Roa members the proposal was withdrawn.

Ngā Aukaha

Tamariki in Aotearoa are suffering the consequences of an underfunded learning support sector. Issues of funding and extremely long wait times for specialists means many tamariki are not receiving the support they need to thrive. Ngā Aukaha representatives from Te Reo Areare are actively looking at ways that we can collectively resolve these issues and ensure equitable outcomes for all tamariki.

Learning Support

2022 – 2023 has been a challenging time for ngā mema o te Umanga Matauranga (Learning Support).

As of June 2023, bargaining for the Field Staff Collective Agreement was still ongoing, and members formally voted to take industrial action on 18 July.

Kaimahi Māori from Te Mahau had the opportunity to meet for a 2-day national hui in November 2022. Tautoko ngā Aukaha, Mōku te Ao and Mana Taurite.

Area School Principals

Bargaining has been the foremost task for Area School Principals with the complexities of being a principal of students studying NCEA, the New Zealand Curriculum or Te Marautanga o Aotearoa Levels 1-8.

Te Kupenga Rangatahi

From 2–5 November 2022, Hayley Crosse and Maihi Parkinson attended the National Australian New Educators Network Conference in Perth where they presented alongside delegates from Japan and Samoa. The conference highlighted that NZEI Te Riu Roa and Aotearoa are leading in indigenous recognition and rights, but also working conditions. New Educators, Australia indicated they would like to have a stronger partnership with Te Kupenga Rangatahi and both parties are working towards whakawhanaungatanga.

Te Mana Ōrite o Te Kōhanga Reo

Kua timata ngā Kōhanga Reo ki te whakawhiti ki te mana ōrite hei utu i ngā kaimahi. Ko te tahua putea o Te Kōhanga Reo 65% ka whakakao aatu ki te tahua putea ka utu nga kaimahi, heoi ko te 35% ka taka ki Te Kōhanga Reo ka utu i ngā Kaiāwhina o te Kōhanga Reo me ngā pire whakahaere i Te Kōhanga Reo.

Kua toru marama etahi Kōhanga Reo kua uru atu ki te mana ōrite – a kua whai hereni te nuinga inaianei.

Kōkirihiā

This is a call to action developed by the Māori Futures Collective – Tokona Te Raki and launched, with the support of the Ministry of Education in Ōtautahi on March 20 2022. NZEI Te Riu Roa was a part of the development of this report based on the AAA framework of Awareness, Alternatives, Action.

Delegation to WIPCE

A delegation of three Te Reo Areare Kaihautū and two staff attended the World Indigenous People's Conference in Adelaide and were supported by Te Huarahi and PPTA. The conference lacked the Kōhanga Reo focus of former hui, and instead keynote speakers were followed by workshops, favouring a strong academic lens. AUT Tāmaki Makaurau, won the tono for the next WIPCE.

ISTP

The International Summit of the Teaching Profession was hosted by the US Department of Education in Washington DC.

Twenty-three countries attended with their Minister of Education and union representatives to discuss three important themes:

1. Elevating and enhancing the teaching profession
2. Educating for global and cultural competence and civic engagement
3. Leveraging digital technologies to ensure equitable access and enhanced learning for all.

National Pasifika Leaders Report to Hui a Tau 2023

ECECA

There have been clear indications that Pasifika and Maori ECE centres have been withdrawing from this agreement which has generated concerns across the sector, which has raised an important question; why are they opting out of this agreement?

Is it the lack of funding, the limited information, or a general confusion about what is available to the sector? We are committed to finding time to meet with Pasifika ECE Teachers to ascertain the facts and find solutions so we can move forward and reach a resolution.

International English Language Testing System (IELTs)

A meeting with university lecturers with a strong interest in eliminating the restrictions created by IELTS for training purposes gave NZEI Te Riu Roa an opportunity to promote our concerns about Pasifika Teachers in Training, particularly when IELTS are being used to restrict progress.

Meeting with Minister Sio

Regular meetings with Minister Sio have been requested by the Minister's office to ensure that the correct information is received. Concerns were raised with Ministry of Education officials about the lack of a Pacific Language Policy.

NZEI Te Riu Roa Pasifika Leaders requested a Pasifika Early Childhood fono be held in Auckland as soon as possible to gather information about the concerns raised.

National Pasifika Fono

The National Pasifika Fono was held in Wellington in April at Te Papa under the theme "Moving with Change, O le aso ma le filiga, o le aso fo'i ma le mata'igatila".

The programme was divided into The Past, The Present, and The Future with a keynote centring each area, followed by a selection of ten workshops.

The fono was colourful, creative, traditional, and informative which sets a pleasingly high bar for the future. This is how nearly 300 educators chose to spend their PLD money, their non-contact time and in some cases, took leave to attend.



2023 National Executive Leadership Groups and Special Education National Reference Groups

Principals' Council

Banapa Avatea
Jenny Bernard
Trudi Brocas
Robyn Brown
Grant Burns
Jane Corcoran
Heidi Hayward
Lisa Hill
Sonya Hockley
Alan Jackson
Bastienne Johnston
Andrew King
Leiana Lambert
Nathan Leith
Stephen Lethbridge
Angela Lowe
Stephanie Madden
(chairperson)
Joanne Mahoney
Denise Marshall
Seletute Mila (Tute)
Mike Molloy
Timothy Page
Maurice Rehu
Briar Scott
Lynda Stuart
Martyn Weatherill
Joan Woods

Primary Teachers' Leadership Team

Amber Beech
Bridget Chilton
Joanne Christie Collyer
Lovi (Erena) Collier
Barbara Curran
Sarah Gladding
Lorraine Guzzo
Anna Hailes
Nera Hicks
Raewyn Himona
Jayne Matetaka
Daniel Miller
Hirere Moana
Anne Moon
Joanne Noanoa
Kahli Oliveira
Tangihia Pouwhare
Juliette Ridge

Special Education National Reference Group

Jo Dowell
Mike Fox (NLG Chair)
Te Aroha Hiko
Julieanne Hoetjes
Kaye Hyams
Beth Melster
Rosemary Miller
Kath Phillips
Colin Tarr
Elizabeth Tomlinson

Support Staff Caucus

Justin Chalmers
Tracey Clifton
Sarah Jane Garner
Lil Giles
Wayne Goodley
Meg Hartigan
Joy Heremia
Crystal Hilton
Linda Jordan
Ally Kemplen
Jan Monds
Sheryl Riceman
Jayne Salesa
Melanie Scouller
Violet Smith
Karin Elisabeth
Stevenson
Annie Te Moana
Thu Zar Kyee
Josephine Westley

Te Ope Kōhungahunga

Paula Nonie Baird
Sandie Burn
Elsa Caldwell
Carol Cook
Michelle Louise Dons
Jessica Duff
Reweti Elliot
Geena Fagan
Natasha Hape
Imogen Held
Zane McCarthy
Amelia McDonald
Marama (Lisa) McRobert
Winnifred Morris
Glenys Murphy
Cara Sharp
Helen Smithies
June Tihi
Catherine Vaughan

Area Council chairs

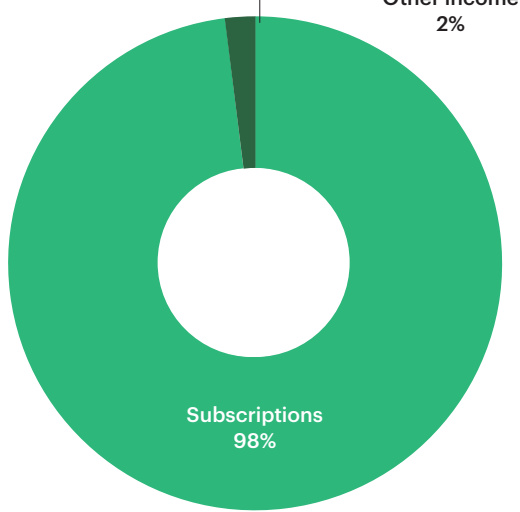
Anna Anderson
Andrea Andresen
Frances Arapere
Delwyn Baird
Belinda Hoad (to July 2023)
Kaareen Hotereni
Antoinette Hudson
Zara Jackson
Jude Karaitiana
Steve Katene
Raewyn Kawana
Maiana McCurdy
Davida Marshall
Cheryl Nixey
Liam Rutherford
Maureen Svensson
Ramona Taogaga
Kathryne Tofia
Pauline Trathen
Kaye Webber
Glenda West

Ngā Aukaha

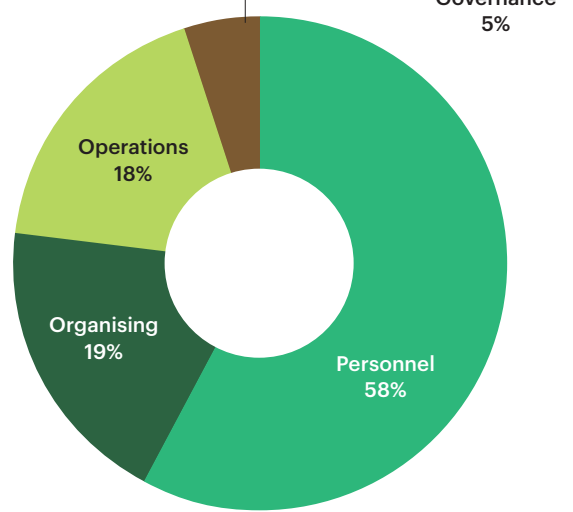
Jenny Albrecht
Tiri Bailey
Natasha Carter-Bing
Conor Fraser
Justine Gamble
Liz Hansen
Denise Hird (Co-Chair)
Monique Jansonius-Albers
Lisa Johnston
Rachel Kavermann
Zac Markham
Teri Pikia (Co-Chair)
Stephen Robinson
Louise Turner

NZEI
TE RIU
ROA
FINANCE
REPORT
2023

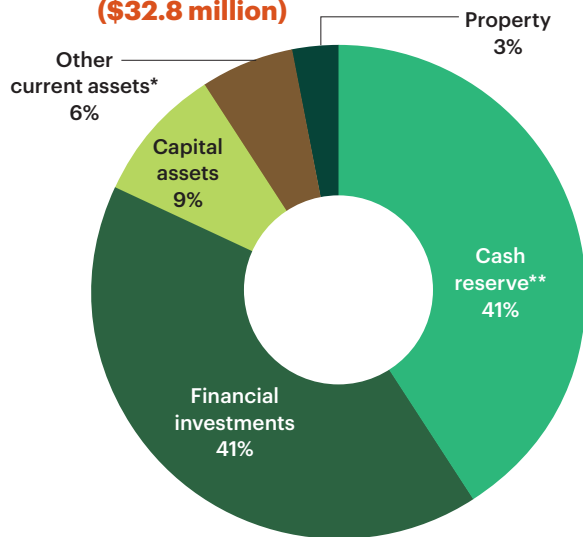
**Where did our money come from?
(\$19.9 million)**



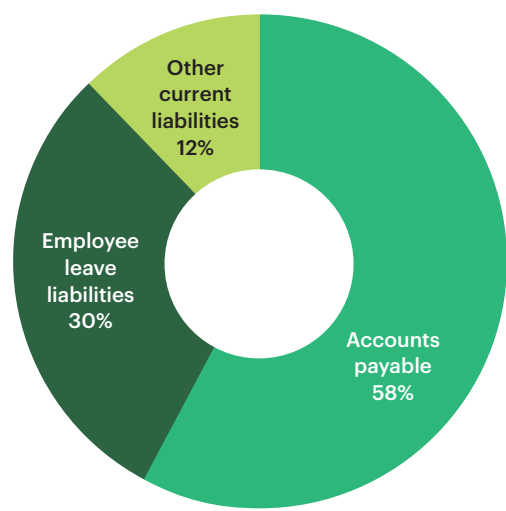
**How was our money spent?
(\$22.3 million)**



**What did we own?
(\$32.8 million)**



**What did we owe?
(\$3 million)**



* other current assets rate includes the \$1.4 million cash held by Branch & Area Councils
** cash reserve rate excludes the \$1.4 million cash held by Branch & Area Councils

What funds do we have?

Reserve	Purpose	Where does the money come from?	Balance at 31 December 2022
Investment portfolio	Ring-fenced for unplanned expenses	Sale of properties of Education House East Block and West Block	\$13.4 million
Reserves Fund	Funds are used on campaigns and projects to support and further the goals and objectives of NZEI Te Riu Roa	50% of net operating surplus from the previous year	\$2.033 million
Legal Assistance Fund	Set up in 2013 to fund major litigation against members	Surplus, capped at \$100k	\$63,000

Finance overview

The overview below is provided to supplement the information in the graphs and tables, and help members understand our finances.

Financial performance – where does our money come from and how is our money spent

Membership subscriptions decreased by \$657k or 3%. At the end of 2022, there were 46,974 members (2021: 48,771), equating to 32,289 FTE (2021: 33,685 FTE).

Total expenditure increased by \$2.4 million or 12% in 2022. In a post-Covid environment, personnel costs went up by 8.7%, governance cost nearly doubled as we finally moved back to the first Hui-ā-Tau in person since 2019. Higher than usual inflation drove up the cost of advocacy, organising, campaigning and operations of the union. We've seen an increase in funding cost as Aronui Tōmua, Komiti Pasifika, Branches and Area Councils made more funding drawdowns from the National Office.

The result for the year (excluding taxes, interest, financial investments and property revaluation) was a deficit of \$2.4 million. This is our operating deficit or "business as usual" result in 2022. The final result for the year (including taxes, interest, financial investments and property revaluation) was a deficit of \$3.8 million.

The statement below illustrates the results of 2022. The deficit meant the Reserves Fund will not be replenished in 2023.

Membership subscriptions

Annual Meeting 2012 passed a resolution to amend the union Rules, approving

membership fees being adjusted on an annual basis to reflect movements in the annual Consumer Price Index (CPI) based on the 12-month period up to 31 December of the previous financial year. The purpose of this was to smooth out the predictability of subscription income increases that would be required to match cost increases, and hence future proof financial stability in the long term.

Annual Meeting 2021 passed a resolution to amend the union Rules, approving membership fees to be adjusted each year in line with the Consumer Price Index (CPI) of the previous year, except in every third year when members vote at Annual Meeting on whether to increase fees.

If Annual Meeting 2023 decides a CPI increase, membership fees will increase by 7.2% from 1 April 2024 in line with the CPI increase for the year to December 2022. In practical terms, this means fee increases for members of between 19 cents and \$1.94 a fortnight (or \$4.88 and \$50.69 a year).

Over the past five years, through Mana Taurite pay equity settlements and collective bargaining, union members have negotiated pay increases that have been greater, on average, than annual increases in CPI.

Operating costs to support members have increased due to higher than usual inflation in 2022. Some costs, for example, travel and accommodation for member leaders to attend national hui and negotiations are

New Zealand Educational Institute Te Riu Roa

Summary of consolidated statement of financial performance

for the year ended 31 December 2022

	Group 2022 \$'000	Group 2021 \$'000
Revenue	19,883	20,410
Expenses	22,258	19,833
Operating (deficit)/surplus	(2,375)	577
Interest income	304	200
(Loss)/gain on investment portfolio	(1,584)	619
Investment property revaluation (loss)/gain	(135)	121
Income tax	1	70
Total (deficit)/surplus for the year	(3,791)	1,447

now significantly higher, petrol and vehicle maintenance for field staff to visit members at schools and centres are becoming more expensive. Increased fees in line with the CPI increase will ensure we meet our basic costs and continue our work in advocacy, organising and campaigning to make wins for the whole of union.

Investment portfolio

National Executive regularly reviews the union's investment portfolio to ensure benchmark market returns are achieved and there is alignment with risk/return characteristics and objectives. This includes reviewing whether our investments are held in socially, environmentally and ethically responsible investment funds.

2022 was a year full of turbulence and poor economic news, after years of positive returns the investment portfolio finished the year with an unrealised loss of \$1,584k. However, our investment funds still have a very healthy balance. The negative return is not a cash drawdown – we only lose money if units in the investment fund are sold. It is important to remember that the union holds the investment portfolio for the purpose of funding unexpected events, not funding operating expenditure.

Property revaluation

NZEI Te Riu Roa revalues its property annually to current market value. The domestic property market has experienced a bigger downturn in property values than expected in 2022. The year-end revaluation resulted in a loss of \$135k. The property has a market value of \$850k at end of 2022. As with unrealised loss on investment portfolio, the \$135k loss in value is not a cash drawdown.

Reserves fund

NZEI Te Riu Roa has a Reserves Fund that draws funds from 50% of the net operating surplus from the previous year. The National Executive believes holding an appropriate Reserves Fund is an important part of its fiduciary duties to the members and to ensure the union can continue to deliver its strategic goals and objectives. NZEI Te Riu Roa financial policy requires a minimum of \$1 million untagged in the Reserves Fund.

We failed narrowly to achieve the target at end of the year: the Reserves Fund had a balance of \$2 million out of which \$993k was untagged to campaigns and projects. In 2022, we used the Reserves Fund to continue

building on the work in ECE growth and pay parity, support staff Mana Taurite pay equity settlements, primary teachers' and principals' campaigns, Ngā Aukaha learning support project, CRM development and the principals' engagement project. In addition, we also funded the Fair Pay Agreements campaign project and the website redesign project.

Financial position – what we own and what we owe

The union endured a challenging year which was reflected on the balance sheet. The cash reserve decreased by \$1.8 million, investment portfolio value dropped by 10% and property lost 14% in market value. NZEI Te Riu Roa financial policy requires cash buffers to be held to cover at least six months of operating expenditure, so on the bright side, our cash buffers remained strong and we finished the year with a seven month cash buffer.

Education House Limited (EHL)

Following the sale of Education House West Block in 2019, we have been working through the process of winding up the EHL company. All the assets held by EHL (as the subsidiary company) have been transferred to NZEI Te Riu Roa (as the parent body) via an intercompany dividend (tax-free) in 2021. EHL was deregistered from the Companies Office on 17 May 2022 after 60 years of incorporation.

Outlook

Next year is an incredibly busy year for NZEI Te Riu Roa as we transition to a new financial year. We will be negotiating a number of major collective agreements across the Schooling, ECE and Learning Support sectors and implementing the outcomes of the settlements. We will be pushing ahead with our Mana Taurite | Pay Equity claim for teachers and launching the union's first ever Fair Pay Agreement for the ECE sector. We are planning to reach out to many new members through increased staffing in our member support and organising teams. A multi-year new membership system (CRM) project is going live. The union cannot achieve this mahi without members' collective strength and the sustainability that CPI-indexed subscription fees gives us. For next year, we are setting "stretch targets" for membership growth after a long period of stagnation over Covid. The union is excited about the opportunities that lie ahead and are committed to working together with our members to achieve our goals.

Summary financial statements

The summary financial statements are for New Zealand Educational Institute Te Riu Roa Incorporated ('the Institute'), its Komiti Pasifika, Aronui Tōmua, Branches, Area Councils and Education House Limited (together referred to as "the Group").

The summary financial statements are presented in New Zealand dollars (\$), which is the Group's functional and presentation currency, rounded to the nearest thousand dollars.

The summary financial statements are extracted from the full consolidated financial statements for the year ended 31 December 2022, which were authorised for issue on 28 April 2023, and upon which an unmodified audit opinion was issued by PricewaterhouseCoopers.

The full consolidated financial statements have been prepared in accordance with New Zealand Generally Accepted Accounting Practice in New Zealand. They comply with the Public Benefit Entity Standards Reduced Disclosure Regime ("PBE Standards RDR") as appropriate for Tier 2 not-for-profit public benefit entities, for which all reduced disclosure regime exemptions have been adopted.

The Institute (Parent) and the consolidated Group are designated as public benefit entities (PBE) for financial reporting purposes.

The summary financial statements comply with PBE FRS 43: Summary Financial Statements. No events have occurred between the date the full consolidated financial statements were authorised and the date the summary financial statements were authorised that require disclosures in these summary financial statements.

These summary financial statements cannot be expected to provide as complete an understanding of the financial performance or financial position of the Institute or its consolidated Group as that provided by the full consolidated financial statements.

The full consolidated financial statements are available by request via email addressed to lily.yin@nzei.org.nz

Statement of service performance

For the year ended 31 December 2022

Who are we?

NZEI Te Riu Roa is the union of more than 46,000 principals, teachers and support staff and specialist staff working in primary, area and secondary schools, early childhood centres, Learning Support and school advisory services. We operate from a national office in Wellington and 12 regional offices across the country.

Why do we exist?

NZEI Te Riu Roa vision is to be the most powerful education union in New Zealand. Our mission is to advocate for a strong, vibrant and well-resourced public education system where all tamariki can reach their full potential.

Mōkū te Ao is the way NZEI Te Riu Roa drives change in the education system to one based on Rangatiratanga so that it leads to success for tamariki Māori. What is good for Māori is good for everyone.

Mōkū te Ao is based around eight pou and is a Māori first approach. It is a part of how we empower our members and staff to work towards system change.

What do we do?

NZEI Te Riu Roa core strategy is to leverage professional and industrial capacity to achieve:

Build	Grow	Win
<ul style="list-style-type: none">• leadership capacity and capability• informed activism• member engagement• our capability and capacity	<ul style="list-style-type: none">• our membership• professional leadership	<ul style="list-style-type: none">• campaigns that advance quality education• outcomes that are aligned with members' priorities and expectations

Statement of service performance

For the year ended 31 December 2022

THREAD 1: CAMPAIGNS				
Goal: grow members, build activism, win campaigns				
No.	Measure	Target	Actual	
			2022	2021
1.1	Membership	> 50,000 members	46,974 members. Not achieved ×	48,771 members. Not achieved ×
1.2	Member engagement	Run workshops	1,197 events and workshops. Achieved ✓	1,195 events and workshops. Achieved ✓
1.3	Digital communications engagement	Baseline year	Facebook page visits baseline established ✓	N/A
1.4	Influence on system-level decisions	Facilitate submissions	13 Submissions. Achieved ✓	17 Submissions. Achieved ✓
1.5	Progress on campaigns' outcomes	Make progress on Pay Equity Claims	Achieved ✓	Achieved ✓

Note:

1.1: Growing membership is a core strategy. There was continued decline in membership across all the sectors during the year with the exception of primary school principals, due in part to the ongoing impacts of Covid affecting face to face organising. In 2022, we invested in staffing in the growth team to recruit more members. We've seen a strong membership growth leading up to paid union meetings and mega strike action in term 1, 2023.

1.2: 1,197 online and face to face workshops (excluding Hui-ā-Tau) were held in 2022, which focussed on organising members, communicating campaign objectives and providing PLD opportunities for members.

1.3: New performance measure in 2022 as digital communication help us to become more versatile, fast, streamlined and practical in connecting with the members. The year 2022 serves as a baseline for the coming financial years performance measurement target. Our social media channels saw steady progress with a good number of page visitors and several posts generating a lot of engagement. Most popular post was "Pay equity win for school administrators" which reached 47,956 users, achieved 2,432 reactions, comments and shares and led to 986 website visits. Our Facebook page visited by over 46,000 users, and is ranked third in user numbers compared to similar organisations' (e.g. ministries & other unions) pages in NZ.

1.4: We get involved by facilitating submissions on key system-level changes relevant to our campaign objectives to influence the laws passed by Parliament. In 2022, we facilitated 13 submissions on a range of topics including Fair Pay Agreement Bill, Teaching Council fees, Code of Conduct for School Board members, promotion and provision of healthy drinks in schools.

1.5: A core strategy is addressing undervaluation of female-dominated workforces through pay equity settlements. We have opted to prioritise largest groups of lowest paid women first. The two settlements completed in 2022 were kaiārahi i te reo and school administrators. Highlights for the kaiārahi i te reo were 79% average pay increase, backpay, professional development fund, review of funding system and visibility of the work through a job description. Highlights for school administrators were 22% average pay increases, backpay, professional development fund and review of funding system. Two further claims on school librarians and school science technicians were substantially progressed during 2022. An in-principle agreement was announced on 13 December 2022 and this was then endorsed by members of the respective professions in February 2023.

The statement of service performance presented for the corresponding year ended 31st December 2021 is unaudited.

THREAD 2: MEMBERSHIP SUPPORT
Goal: build capability in delivering quality advice and support to members

No.	Measure	Target	Actual	
			2022	2021
2.1	Member Support Centre satisfaction survey	> 85% satisfaction score	No result. Not achieved ×	80% satisfaction score. Not achieved ×
2.2	Legal Services satisfaction survey	> 80% satisfaction score	No result. Not achieved ×	86% satisfaction score. Achieved ✓

Note:

In order to have quantitative data to assess our membership support quality, we annually survey (by phone) a random selection of members about their interaction with us. They are asked to answer questions on a scale of 1-5 (1 being the lowest, 5 being the highest) and results of 3 or above are added together to determine a percentage satisfaction score. These results are tracked year-on-year to establish trends and analysed to provide insight into changes that may be made to improve our support to members. Surveys were not run in 2022 pending the introduction of online, real-time surveying in 2023.

THREAD 3: ENVIRONMENT
Goal: build capability in measuring carbon profile and lowering carbon emissions

No.	Measure	Target	Actual	
			2022	2021
3.1	Carbon profile	Carbon profile is certified	Not achieved ×	Not achieved ×

Note:

NZEI Te Riu Roa has engaged a company called Tadpole to assist us in creating a certified carbon profile which once complete, will assist us to set targets for carbon emission reductions in 2023. We did not achieve the target in 2022, however, this work has been completed in February 2023.

THREAD 4: FINANCE
Goal: build a strong financial position

No.	Measure	Target	Actual	
			2022	2021
4.1	Net operating surplus	Surplus	\$355k deficit. Not achieved ×	\$576k surplus. Achieved ✓
4.2	Cash buffers	> 6 months	7 months. Achieved ✓	8 months. Achieved ✓
4.3	Reserves Fund	> \$1 million untagged	\$993k untagged. Not achieved ×	\$926k untagged. Not achieved ×

Note:

4.1: A net operating surplus is essential in building a strong financial position. We did not meet the target in 2022 due to a decline in membership.

4.2: Our policy requires cash buffers to be held to cover at least six months of operating expenditure. This is to ensure the union can continue to operate for at least 6 months (equivalent to \$9.8 million) without revenue. It is a standard buffer for organisations of our size. We met the target in 2022; our cash buffers were sufficient to cover 7 months (equivalent to \$11.4 million) of operating expenditure.

4.3: Keeping a minimum of \$1 million Reserves Fund untagged ensures the union can continue to deliver its strategic goals and objectives. The National Executive believes holding an appropriate Reserves Fund is an important part of its fiduciary duties to the members. We did not meet the target in 2022.

The statement of service performance presented for the corresponding year ended 31st December 2021 is unaudited.

New Zealand Educational Institute Te Riu Roa

Consolidated statement of comprehensive revenue and expense

for the year ended 31 December 2022

	Notes	Group 2022 \$'000	Group 2021 \$'000
Revenue			
Subscriptions		19,485	20,142
Rental income from investment property		35	38
Other income		363	230
Expenses			
Employee compensation and benefits	1	12,911	11,873
Depreciation and amortisation	1	414	290
Operating lease expense	1	1,528	1,461
Other expenses	1	7,405	6,209
Operating (deficit)/surplus		(2,375)	577
Finance income		304	200
Fair value (loss)/gain on financial assets		(1,584)	619
Fair value (loss)/gain on investment property		(135)	121
(Deficit)/surplus before income tax		(3,790)	1,517
Income tax expense		1	70
(Deficit)/surplus for the year attributable to the members		(3,791)	1,447
Total comprehensive revenue and expense for the year attributable to the members		(3,791)	1,447

The above consolidated statement of financial performance should be read in conjunction with the accompanying notes.

New Zealand Educational Institute Te Riu Roa

Consolidated statement of changes in net assets/equity

for the year ended 31 December 2022

	Group 2022 \$'000	Group 2021 \$'000
Retained earnings		
Retained earnings at 1 January	31,656	29,194
Net (deficit)/surplus for the year	(3,791)	1,447
Transfers from retained earnings to Reserves Fund	(1,580)	(1,137)
Utilisation of Reserves Fund and Legal Assist Fund	1,320	2,152
Retained earnings at 31 December	27,605	31,656
Reserve Fund and Legal Assist Fund		
Reserve Fund and Legal Assist Fund at 1 January	1,836	2,851
Transfers from retained earnings to Reserves Fund	1,580	1,137
Utilisation of Reserves Fund	(1,304)	(2,131)
Utilisation of Legal Assist Fund	(16)	(21)
Reserve Fund and Legal Assist Fund at 31 December	2,096	1,836

The above consolidated statement of changes in net assets/equity should be read in conjunction with the accompanying notes.

Consolidated statement of financial position

as at 31 December 2022

	Notes	Group 2022 \$'000	Group 2021 \$'000
Assets			
Current assets			
Cash and cash equivalents		2,420	2,348
Short term deposits		12,399	14,373
Trade and other receivables		542	465
Income tax receivable		14	8
Total current assets		15,375	17,194
Non-current assets			
Financial assets		13,511	15,058
Intangible assets		270	3
Investment property	2	850	985
Property, plant and equipment	2	2,754	2,832
Total non-current assets		17,385	18,878
Total assets		32,760	36,072
Liabilities			
Current liabilities			
Payables from exchange transactions		2,711	2,158
GST payable		348	422
Total current liabilities		3,059	2,580
Total liabilities		3,059	2,580
Net assets attributable to the members		29,701	33,492
Equity			
Reserves		2,096	1,836
Retained earnings		27,605	31,656
Total equity attributable to the members		29,701	33,492

The above consolidated statement of financial position should be read in conjunction with the accompanying notes.

Consolidated statement of cash flows

for the year ended 31 December 2022

	Group 2022 \$'000	Group 2021 \$'000
Cash flows from operating activities		
Cash from subscriptions	19,419	20,223
Cash from property rentals	35	38
Sundry income	363	528
Interest received	245	194
Tax paid	(82)	(102)
Payments to suppliers and employees	(21,274)	(19,161)
Net cash (outflow)/inflow from operating activities	(1,294)	1,720
Cash flows from investing activities		
Purchases of property, plant and equipment (PPE)	(338)	(2,821)
Purchases of intangible assets	(270)	-
Purchase of financial assets	-	(6,000)
Investment in short term deposits	(8,776)	(28,500)
Divestment from short term deposits	10,750	35,210
Net cash inflow/(outflow) from investing activities	1,366	(2,111)
Net increase/(decrease) in cash and cash equivalents	72	(391)
Cash and cash equivalents at beginning of the year	2,348	2,739
Cash and cash equivalents at end of the year	2,420	2,348

The above consolidated statement of cash flows should be read in conjunction with the accompanying notes.

Notes to the summary consolidated financial statements

for the year ended 31 December 2022

Note 1 Total expenditure

	Group 2022 \$'000	Group 2021 \$'000
Operational expenditure		
Employee compensation and benefits:		
- Salaries and wages	11,930	10,965
- Pension costs (defined contribution plan)	894	836
- Other employment benefits	87	72
Total employee compensation and benefits	12,911	11,873
Depreciation and amortisation	414	290
Operating lease expense	1,528	1,461
Financial and administration expenses	1,128	1,082
National office operations	685	668
Field office operations	105	111
Māori team operations	57	53
Total operations	16,828	15,538
Organising expenditure		
Field office organising	134	124
Māori workplan	22	13
Membership support	121	101
Membership organising	450	101
International activities	210	120
Legal services	40	80
Branch / Area Council expenditure	1,290	1,056
Inter-union activities	297	275
Communications	269	273
Strategies (excluding personnel costs)	1,327	1,432
Pasifika	10	65
Total organising	4,170	3,640
Governance expenditure		
National executive	490	399
Annual meeting	516	47
Māori governance	254	190
Total governance	1,260	636
Education House expenditure		
Education House Ltd	-	19
Total Education House	-	19
Total expenditure	22,258	19,833

Notes to the summary consolidated financial statements

for the year ended 31 December 2022

Note 2 Investment property and property, plant and equipment

	Investment Property (valuation)	Computer Hardware (cost)	Furniture & Fittings (cost)	Other Equipment (cost)	Leasehold Improvement (cost)	Total property, plant and equipment
	\$'000	\$'000	\$'000	\$'000	\$'000	\$'000
At 1 January 2021						
Cost or valuation	864	553	90	47	196	886
Accumulated depreciation	-	(326)	(79)	(16)	(99)	(520)
Net book amount	864	227	11	31	97	366
At 31 December 2021						
Cost or valuation	985	573	350	231	2,247	3,401
Accumulated depreciation	-	(357)	(56)	(57)	(103)	(573)
Net book amount	985	216	294	174	2,144	2,828
Year ended 31 December 2022						
Opening net book amount	985	216	294	174	2,144	2,828
Revaluation	(135)	-	-	-	-	-
Additions	-	-	-	-	-	-
Transfers to/(from) WIP	-	119	140	6	77	342
Depreciation charge	-	(157)	(39)	(67)	(151)	(414)
Disposals at cost	-	(118)	(20)	(5)	(18)	(161)
Disposals accumulated depreciation	-	115	21	5	18	159
Closing net book amount	850	175	396	113	2,070	2,754
At 31 December 2022						
Cost or valuation	850	573	471	232	2,306	3,582
Accumulated depreciation	-	(398)	(75)	(119)	(236)	(828)
Net book amount	850	175	396	113	2,070	2,754

Note 3 Events occurring after the reporting date

There were no events occurring after reporting date requiring disclosure.



Report of the independent auditor on the summary financial statements

To the Members of New Zealand Educational Institute Te Riu Roa Incorporated

The summary financial statements comprise:

- the consolidated statement of financial position as at 31 December 2022;
- the consolidated statement of comprehensive revenue and expense for the year then ended;
- the consolidated statement of changes in net assets/equity for the year then ended;
- the consolidated statement of cash flows for the year then ended;
- the statement of service performance; and
- the notes to the summary consolidated financial statements.

Our opinion

The summary financial statements are derived from the audited consolidated financial statements of New Zealand Educational Institute Te Riu Roa Incorporated (the Institute) and its controlled entities (together, the "Group") for the year ended 31 December 2022.

In our opinion, the accompanying summary financial statements are consistent, in all material respects, with the audited consolidated financial statements, in accordance with PBE FRS-43: *Summary Financial Statements* issued by the New Zealand Accounting Standards Board.

Other Matter

The statement of service performance presented for the corresponding year ended 31 December 2021 is unaudited.

Summary financial statements

The summary financial statements do not contain all the disclosures required by Public Benefit Entity Standards Reduced Disclosure Regime (PBE RDR). Reading the summary financial statements and the auditor's report thereon, therefore, is not a substitute for reading the audited consolidated financial statements and the auditor's report thereon. The summary financial statements and the audited consolidated financial statements do not reflect the effects of events that occurred subsequent to the date of our report on the audited consolidated financial statements.

The audited consolidated financial statements and our report thereon

We expressed an unmodified audit opinion on the audited consolidated financial statements in our report dated 28 April 2023.

Information other than the summary financial statements and auditor's report

The National Executive is responsible for the annual report. Our opinion on the summary financial statements does not cover the other information included in the annual report and we do not express any form of assurance conclusion on the other information.

In connection with our audit of the summary financial statements, our responsibility is to read the other information and, in doing so, consider whether the other information is materially inconsistent with the summary financial statements, or otherwise appears to be materially misstated. If, based on the work we have performed on the other information, we conclude that there is a material misstatement of this other information, we are required to report that fact. We have nothing to report in this regard.

Responsibilities of the National Executive for the summary financial statements

The National Executive is responsible, on behalf of the Institute, for the preparation of the summary financial statements in accordance with PBE FRS-43: *Summary Financial Statements*.



Auditor's responsibility

Our responsibility is to express an opinion on whether the summary financial statements are consistent, in all material respects, with the audited consolidated financial statements based on our procedures, which were conducted in accordance with International Standard on Auditing (New Zealand) 810 (Revised), *Engagements to Report on Summary Financial Statements*.

We are independent of the Group. Our firm carries out other services for the Group in the areas of tax compliance and tax advisory services. The provision of these other services has not impaired our independence as auditor of the Group.

Who we report to

This report is made solely to the Institute's Members, as a body. Our audit work has been undertaken so that we might state those matters which we are required to state to them in an auditor's report and for no other purpose. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than the Institute and the Institute's Members, as a body, for our audit work, for this report or for the opinions we have formed.

PricewaterhouseCoopers

Chartered Accountants
31 July 2023

Wellington