

CONTACT WITH NZEI - PROTOCOLS FOR PRINCIPALS

Inward Calls from Members - General

The initial contact between a member and NZEI will usually be through the 0800 – NZEI-HELP line. The member’s issue may be resolved during this initial discussion with the Membership Advisory Officer (MAO). If the member/issue needs further support or action the member/issue may be referred to an Industrial Officer or a Professional Officer. Depending on the nature of the issue the Director, Legal and Compliance may become involved.

Inward Calls from Principal Members

For the majority of calls, particularly under scenarios (ii) and (iii) below, principals are no different from other members. Their initial contact will be through the 0800 – NZEI-HELP line. If the issue is not resolved by the MAO the principal may be referred to:

- An Industrial Officer (IO)
- A Professional Officer (PO)
- The Director, Legal and Compliance or
- A Principal Support Officer (PSO).

Depending on the nature of the case a regional Field Officer may become involved.

Nature of Calls from Principals

There are five main scenarios in which a principal member contacts NZEI Te Riu Roa:

- i. The principal has a professional issue that the principal wishes to raise with one of the professional officers.

- ii. The principal is requesting advice and/or support: for or on behalf of a teacher or support staff employee for that member’s personal employment issue. These discussions are often to simply clarify an employee’s entitlements, e.g. interpretation of an item in a Collective Agreement.

- iii. The principal may wish to simply “have a chat” with a PSO or a local field officer with whom they have established a collegial and trusting relationship.

- iv. The principal is requesting advice and/or support: for a personal employment issue

- v. The principal is acting as the employer’s agent, often seeking advice or support before or after initiating competence or disciplinary procedures.

The following protocols refer to scenarios (i), (iv) and (v).

INITIAL CONTACT BETWEEN A PRINCIPAL MEMBER AND NZEI

A principal phones the 0800 NZEI-HELP number and speaks to a Membership Advisory Officer (MAO).

The MAO will ascertain whether the call is a:

- Request to speak on a professional matter with a professional officer, or
- Personal Employment Issue, or
- Case of the principal acting as the employer's agent

A PROFESSIONAL ISSUE

If the call is a request to speak on a professional matter with a professional officer the MAO will either transfer the call through to the appropriate contact number or arrange for the member to be called back.

B PERSONAL EMPLOYMENT ISSUE

Refer "Flow Chart No. 1"

1 MAO gives appropriate advice

- If the issue is resolved no further action is required.
- If the issue is not resolved the MAO will refer the matter on.

2 MAO refers the matter to the relevant Industrial Officer who will:

- Provide appropriate advice and support, or
- Refer the member to the relevant Principal Support Officer for support, or
- Progress as a Personal Case

Where the issue becomes a "personal case" the Industrial Officer may, in consultation with the Director, Legal and Compliance, delegate the case to a Principal Support Officer.

If a local field officer is to be involved, the Director, Legal and Compliance will involve the relevant Regional Secretary.

C PRINCIPAL ACTING AS THE EMPLOYER'S AGENT

Refer "Flow Chart No. 2"

1 MAO gives appropriate advice

The advice provided by the MAO should be restricted to:

- Clarifications of the various Collective Agreements
- Processes outlined in such documents as:
 - the Principals Kit

- o the MoE Funding, Staffing and Allowances Handbook

Should the issue not be resolved and there is a need for further advice and/or support, the MAO will refer the matter to the relevant Industrial Officer or the Director, Legal and Compliance or a Principal Support Officer.

The principal will also be advised of the support available from NZSTA.

2 Matter referred to the relevant Industrial Officer, Director, Legal and Compliance or Principal Support Officer

This further advice and/or support will be an extension of or an expansion on the type of advice given by the MAO. The object will be to give the principal:

- A clear understanding of Collective Agreement provisions
- An awareness of good practice.

The effect will be to give the principal a degree of “comfort” around the processes being used.

REPRESENTATION AND ADVOCACY WHERE THE PRINCIPAL IS ACTING AS THE EMPLOYER’S AGENT

In cases where the principal is acting as the Employer’s Agent, there will often be a request for an NZEI officer to “represent” the principal at, for example, a disciplinary or competency meeting. The principal may envisage the need for some form of personal “advocacy” or “representation” in such situations.

Requests for such advocacy or representation will be declined. Such representation/advocacy would:

- Be inappropriate. Such advocacy is the prerogative and responsibility of organizations such as NZSTA;
- Probably negate Insurance policies;
- Be unnecessary if the principal is comfortable with the collective agreement provisions and processes;
- Send a number of wrong messages about the authority and competency of the principal.

If the principal feels the need for support at a meeting the principal will be advised to seek the attendance of a person such as:

- An AP or DP, a principal colleague, a MSP member, a NZSTA field officer; a Board member.

On-going Support for the Principal

During the course of a case such as referred to above, principals can be assured of on-going support from their Union:

- A Principal Support Officer would be available to the principal member for discussion and support.

- The principal would have access to the services of the Members Support Personnel, (NZEI counselors)
- If, as a result of the case, the Board of Trustees took action against the principal, NZEI would view the matter as a separate personal case and provide industrial support for the principal.

PRINCIPAL MEMBERS CONTACT WITH NZEI

Principal rings 0800 NZEI HELP
(0800 693 443)

MEMBERSHIP ADVISORY OFFICER (MAO)

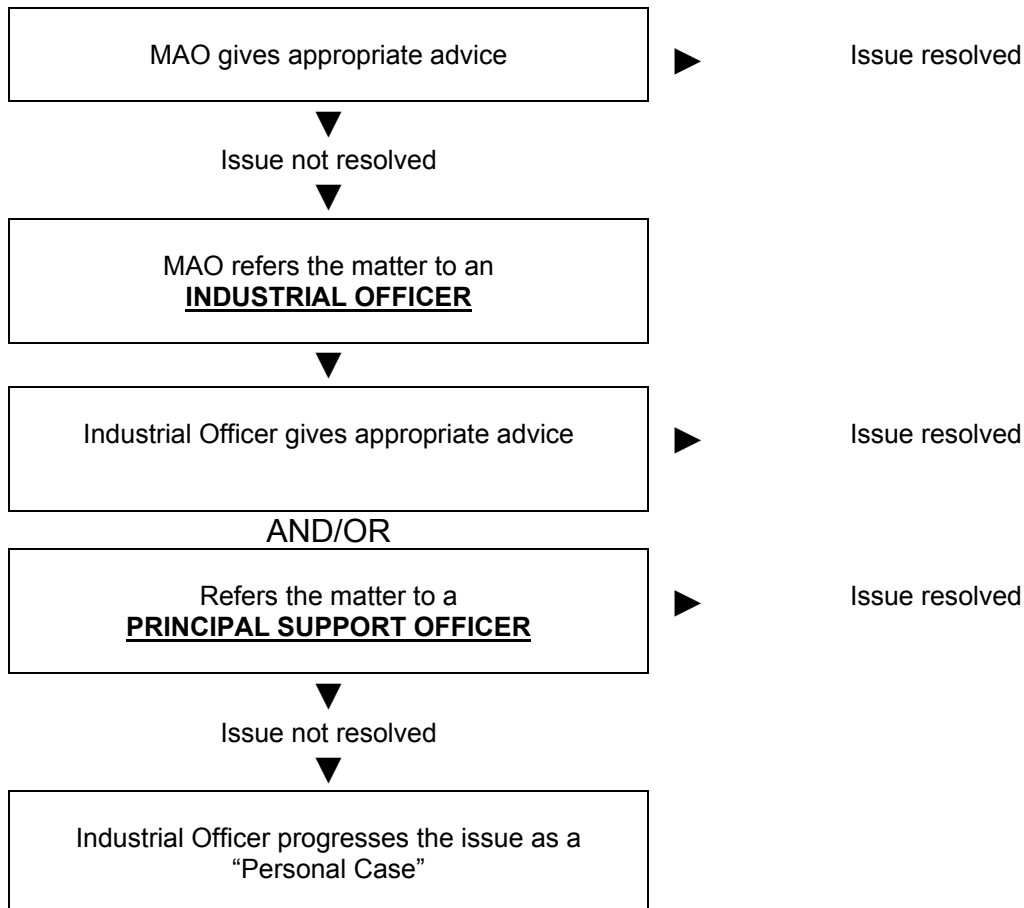
ascertains whether the call is:

- I. A request to speak on a professional matter
- II. A personal employment issue or
- III. The principal acting as the employer's agent

- i. Where the MAO ascertains that the call is a professional matter best handled by a professional officer the MAO will either transfer the call through to the appropriate contact number or arrange for the member to be called back.

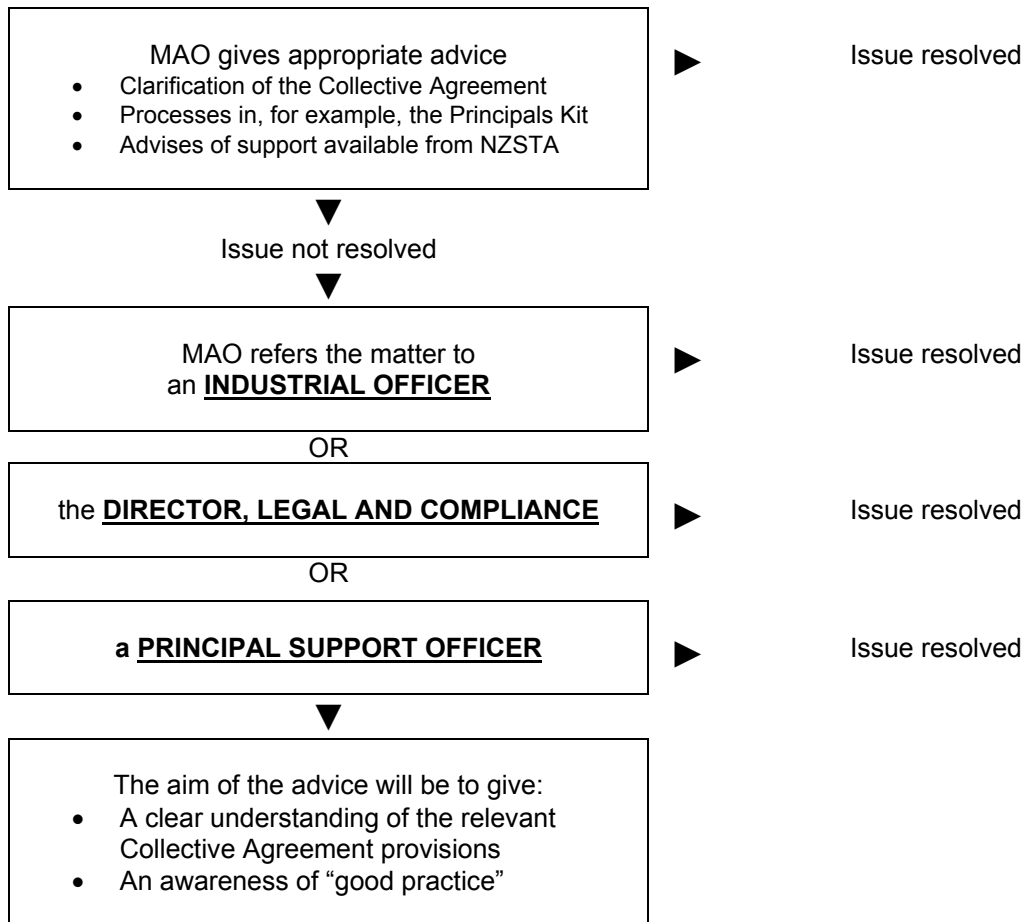
FLOW CHART #1

ii PRINCIPAL HAS A PERSONAL EMPLOYMENT ISSUE



FLOW CHART #2

iii. PRINCIPAL IS ACTING AS THE EMPLOYER'S AGENT



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