

# Resource Teachers: Learning and Behaviour (RTLB) Service

## Governing and Managing RTLB Clusters

Version 6: July 2024

### **Version control**

This document is updated periodically to reflect changes in policy or practice. Each time there is a change, the updated version replaces the previous version on the Ministry's websites (TKI) and confluence, and Lead Schools and Managers Integrated Services, Directors and Takiwa Hautū are notified.

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# INTRODUCTION AND OVERVIEW

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*Governing and Managing RTLB Clusters* is written for RTLB lead school boards (boards), and for RTLB cluster leadership teams. It provides information to support lead schools interpret and implement the RTLB Funding Agreement and to effectively govern and manage the RTLB service on behalf of their cluster of schools.

## Terminology

In this document the following terms are used:

- mokopuna is used to refer to children and young people
- whānau is used to refer to families, whānau, and caregivers
- kaiako is used to refer to teachers and kaiako
- tumuaki is used to refer to school leaders
- educators is used to refer to all who work in schools including kaiako, tumuaki, teachers' aides, SENCOs and LSC.

## RTLB Service - Core Beliefs

He Pikorua principles reflect the values and beliefs that guide all RTLB work including, [Mokopuna and whānau-centred](#), [Collaborative](#), [Strengths-based](#), [Culturally affirming and responsive](#), [Inclusive](#), [Ecological](#) and [Evidence-informed](#).

This means:

- the most effective way to make gains for mokopuna is by taking a holistic, strengths-based approach that enhances the mana of the individual and their community by focusing on their strengths and their potential to address challenges.
- RTLB work in partnership with educators and whānau to find solutions that support mokopuna. They build educators' and schools' inclusive practice.
- support can be based on what best meets the needs of the mokopuna and their whānau in the context of their local learning and community environments.

## The bigger picture

The Ministry Statement of Intent<sup>1</sup> 2021 to 2026 outlines the Ministry's vision and purpose.

The vision for education reflects the overwhelming aspirations of New Zealanders for a more inclusive, equitable, connected and future-focused New Zealand learning system, through five overarching objectives within the National Education Learning Priorities (NELP):

- Learners at the centre — Learners with their whānau are at the centre of education. » Barrier-free access — Greater education opportunities and outcomes are within reach for every learner.
- Quality teaching and leadership — Quality teaching and leadership makes the difference for ākonga | learners and their whānau.
- Future of learning and work — Learning needs to be relevant to the lives of New Zealanders today and throughout their lives, as we meet the changing opportunities and challenges of the future of work.

The Ministry's purpose is to shape an education system that delivers equitable and excellent outcomes through shaping and operational roles.

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<sup>1</sup> [SPG-0775-Statement-of-Intent-2021-2026\\_AW-Web-1.pdf \(education.govt.nz\)](#)

Te Mahau was established in 2021, in response to the review of Tomorrow's Schools, which called for more responsive, accessible and local support for our early learning services, schools and kura. Te Mahau work alongside early learning services, schools and kura on a daily basis to provide services and support for their ākonga, whānau and communities [temahau.govt.nz/](http://temahau.govt.nz/)

Te Mahau is working on key shifts to:

- take practical action to give effect to Te Tiriti o Waitangi
- give priority to regional and local voice
- deliver greater responsiveness, accountability and integrated services and support
- improving feedback loops and information flows.

The Board of each employing school ensures the Government's priorities and the Ministry's service priorities and service expectations described in the RTLB Funding Agreement<sup>2</sup> are embedded in the work of the service. This includes implementing Ka Hikitia – Ka Hāpaitia and Tau Mai Te Reo, the Action Plan for Pacific Education and noticing and responding to neurodiversity across all priorities.

RTLB service in all cluster schools/kura uses *He Pikorua* as a guiding practice framework and enables the delivery of The New Zealand Curriculum ([NZC](http://nzcurriculum.org.nz/)) and/or Te Marautanga o Aotearoa.

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<sup>2</sup> Refer pages 3, 10-13 of the Funding Agreement [Governance & management / Home - Resource Teacher: Learning and Behaviour \(tki.org.nz\)](#)

## HOW THE RTLB SERVICE IS ORGANISED

Nationally, all State and State Integrated kura/schools<sup>3</sup> can access RTLB services through 40 RTLB clusters for students in years 1 to 10. One school in each cluster (lead school) provides the service to, and on behalf of, all schools in the cluster. The lead school principal, cluster manager and practice leaders make up the Strategic Leadership and Management Teams for each cluster.

Figure 1 RTLB service organisation



### SERVICES

The RTLB service is a key provider of specialist teacher support within the New Zealand Education system with a focus on a wide range of learning and behaviour related needs, so the achievement, progress, wellbeing and participation of mokopuna is valued and supported. RTLB work with mokopuna, whānau, educators and leaders in state and state integrated schools and Kura including delivery in Kura Kaupapa Māori and Māori medium settings<sup>4</sup>.

RTLB services are part of the wider learning support system which is focused on what best meets the needs of mokopuna within their local community. Learning support needs refers to a wide range of learning needs including neurodiversity, gifted, delay, disadvantage, disability, health and wellbeing and those at risk of disengaging from education. The intent of all learning support including the RTLB service is to bring together groups of education providers in a community – including government agencies and service providers, to identify local resources and respond to local needs in flexible and tailored ways, based on He Pikorua as a shared practice framework. This focuses on shared principles, Te Tūāpapa<sup>5</sup>, collaborative relationships, a collective inquiry approach, and knowledge of evidence-based practice to support mokopuna to succeed.

### RTLB CLUSTERS

RTLB clusters are groups of experienced, itinerant, fully registered specialist teachers who hold a current practicing certificate and who are trained or are eligible to enrol to train in the Massey University Specialist Teaching Learning and Behaviour course, so they have the skills to provide high quality RTLB services. Based on Te Tūāpapa o He Pikorua

<sup>4</sup> The term Kura kaupapa Māori includes Matakahuki affiliated settings including immersion, rūmaki and bilingual settings in English medium schools, and independent immersion schools or kura sometimes referred to as Kura motahake. Te Matakahuki is the name for the collective that includes the Kohanga Reo National Trust, Te Rūnanga Nui o Ngā Kura Kaupapa Māori, Ngā kura a iwi, and Te Taihū o Ngā Wānanga.

<sup>5</sup> Te Matua (universal), Te Kāhui (targeted) and Te Arotahi (tailored) support.

(Te Matua, Te Kāhui, Te Arotahi) RTLB work with teachers, schools, parents and whānau - and other organisations - to provide learning support to help mokopuna fulfil their learning potential when barriers they face exceed what the school can provide.

Each cluster has an allocated number of RTLB FTTE. Clusters set up a professional leadership structure led by the cluster manager and supported by the practice leaders that ensures all RTLB provide an effective, quality service to cluster schools. Each cluster school has a liaison RTLB to support relationships and ease of access to the service in all cluster schools and kura.

## **RTLB LEAD SCHOOLS**

Nationally 40 lead schools employ clusters of RTLB to provide the service.

Lead school boards:

- provide governance and strategic direction for the RTLB service in the cluster
- ensure processes and systems are in place so that a high quality RTLB service is provided to all schools in the cluster
- delegate the leadership and management of the service to the lead school principal and the cluster manager, including financial delegations and employer responsibilities
- provide policies under which the cluster operates and adheres to.

## **RTLB LEAD SCHOOL PRINCIPALS' EXECUTIVE GROUP**

A representative group of RTLB lead school principals meet each term with Ministry National Office staff to discuss RTLB related matters. The group is elected by their peers at the annual RTLB National Forum and has an elected chairperson. The Executive seconds cluster managers to support the executive. They also invite Te Mahau representation.

## **TE MAHAU LEARNING SUPPORT SERVICES**

Te Mahau has three frontline groups and each group contains a number of regions (12 in total). Each takiwā has a Hautū and a Chief Advisor Learning Support:

- Te Mahau | Te Tai Raro (North)
- Te Mahau | Te Tai Whenua (Central)
- Te Mahau | Te Tai Runga (South)

Te Mahau includes two national groups :

- Te Poutāhū (Curriculum Centre)
- Te Pae Aronui (Operations and Integration)

Each of the 12 regions has a Director of Education, Managers Integrated Services, Manager Operations and Insights, Manager Planning and Advice and a Strategic Advisor Māori.

With line management from Managers Integrated Services, learning support teams and services are managed by Service Managers.

Te Pou Hanganga, Matihiko | Infrastructure & Digital (TPHM) supports the lead schools with property matters related to RTLB accommodation and digital infrastructure.

## Collaboration with Ministry staff

The quality of learning support provision to students, schools/kura, clusters, and networks of schools relies on:

- the establishment and maintenance of respectful working relationships:
  - RTLB lead school principals' Executive and Ministry, the Deputy Secretary Te Pae Aronui, The General Manager Learning Support, Takiwā Hautū, and across Te Mahau
  - Lead school principals, Ministry Directors of Education, Managers of Learning Support, Education Managers and Kāhui Ako Lead Principals
  - RTLB cluster managers, Ministry Service Managers
- working in equal partnership to:
  - establish and maintain one system of learning support access and provision in line with the LSDM and He Pikorua
  - establish and maintain joint request-for-support and review processes across Te Mahau and RTLB to provide timely service access for schools and whānau
  - sharing expertise and resources
  - solve problems.
- a two-way exchange of open and honest communication to share data, information, thoughts, and ideas and seek to reach mutual understanding and agreement on the views of each party.

## Key Stakeholders

Key stakeholders in the RTLB service at the cluster level include Te Mahau leaders, all RTLBs employed in the cluster and all cluster schools who represent their communities, including:

- school and kura leadership teams, SENCo/LSC and teachers and students
- their families and whānau
- their hapu and iwi and Māori parents/community
- their Pacific parents/community.

Key stakeholders need to be assured the service is managed in a transparent and needs-based manner. The lead school must formalise a way of consulting with key stakeholders to ensure this happens. There are many ways this can be done, for example through a stakeholder committee or advisory group, and/or through regular surveys and reporting.

Key stakeholders in the RTLB service must have genuine input into strategic planning and into service development and provision. They must receive regular RTLB service information from the lead school/RTLB management team and have the opportunity to provide feedback to the lead school.

Te Mahau and cluster schools are expected to take an active interest in the RTLB service. It is in the stakeholder and the cluster interests to:

- advocate for the RTLB service
- support and advise the lead school board
- inform the development of the cluster strategic plan and cluster priorities
- provide feedback about RTLB service provision including raising any concerns or issues
- support culturally responsive cluster practice.

With due regard to student and school privacy, clusters are encouraged to engage school/Kura stakeholders in request-for-support and learning support funding allocation processes.

## RTL B Funding Agreement

The RTL B Funding Agreement describes the roles and responsibilities of each of the parties to the Agreement i.e. Te Tāhuhu o te Mātauranga | The Ministry of Education (Ministry) and the RTL B lead school board. It sets the service priorities and expectations that are the focus of cluster service delivery, planning and reporting.

In the final year of the Funding Agreement term, there will be a review of the Agreement including the services provided. This helps the Ministry to plan for the next agreement, through feedback to ensure service provision continues to align with Education and Government priorities.

When Funding Agreements come to term:

- the Ministry will seek written confirmation of boards' intention to continue in the role of RTL B lead school in advance of the end of the agreement.
- the Ministry will draft a new Funding Agreement in collaboration with the RTL B lead school principals' Executive using the existing agreement as a basis for discussion in tandem with new Ministry and Government directions.
- once approved by the Deputy Secretary Te Pae Aronui, the new agreements will be distributed to boards to sign before the final Ministry signature is added.

### Review and variations

The Ministry may advise clusters of amendments to the funding agreement to reflect changes in priorities, resourcing, funding, policy, or capacity in consultation with the Board<sup>6</sup>.

Staffing entitlement and RTL B Cluster operational funding may be varied by the Ministry by 27 January each year to reflect any changes in priorities, resourcing, funding, policy, or capacity<sup>7</sup>

### Termination

The Ministry or the Board may terminate the funding agreement by giving at least 6 months written notice. Pages 5 and 6 list conditions for the Ministry to terminate the agreement with a Board.

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<sup>6</sup> P7 RTL B Funding Agreement 2024 -2025.

<sup>7</sup> P 14 RTL B Funding Agreement 2024 -2025.



# EFFECTIVE GOVERNANCE FOR BOARDS

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## Role of the Lead School/Kura Board

Effective governance ensures the provision of a quality RTLB service for all cluster schools. Boards will ensure the Government's priorities and the Ministry's annual service priorities and service expectations are embedded in the work of the service.

RTLB lead school boards are the employing school for a team of RTLB and are the stewards of the RTLB service for a cluster of schools. A lead school board governs the RTLB service on behalf of these schools as set out in the funding agreement.

### Selection

A school board in each cluster is appointed to the RTLB lead school position by the Ministry of Education (Ministry) to provide the cluster's RTLB service. The Ministry works with cluster schools on the selection process to choose the lead school. The appointment is for the term specified in the funding agreement and reviewable in the final year of each agreement.

### Governance

The Board will govern the RTLB service in the interests of all schools and Kura in the cluster and in accordance with the Education and Training Act 2020, Te Tiriti o Waitangi /Treaty of Waitangi and the National Education Learning Priorities (NELP)<sup>8</sup>.

#### Success measures

- Appropriate authority and accountability is delegated to the principal and cluster manager (the RTLB strategic leadership and management team) for the day to day management of the RTLB cluster, RTLB funding and resourcing, and RTLB service provision.
- The objectives in the RTLB Strategic and Annual Plans are met.
- RTLB cluster staff are recruited and appointed.
- RTLB funds are used for the provision of the RTLB service.
- Reporting requirements are fully met.
- Cluster review processes (self, peer or external) inform service improvements.

### Professional Relationships

Te Mahau is committed to positive, professional, trusting, and respectful relationships with the RTLB service at all levels and at all times. The Board will ensure professional, trusting, and respectful relationships at all levels and at all times with all key stakeholders.

#### Success measures

- RTLB Cluster schools and Kura value the relationship they have with the RTLB service as reflected through service access and satisfaction data, including Kāhui Ako and other cluster groups.
- RTLB and Ministry learning support practitioners work collaboratively with schools, Kura and communities, including SENCOs and Learning Support Coordinators, to provide flexible, responsive, and joined-up support as appropriate to needs identified.

- RTLB collaborate to provide system wide, targeted or individual support to schools, mokopuna, and their families and whānau (Te Tūāpapa). This may include participation in education related panels linked to learning support.
- RTLB work to support schools and Kura to partner with families and whānau to plan support for their mokopuna in ways that work for them, values their contribution, and reflects their unique identity, languages and cultures.

### **Access and Service Provision**

The Board will ensure:

- a high quality and effective RTLB service is provided.
- the service works with the Ministry on the continued implementation and embedding of the LSDM and He Pikorua.
- the service is easily accessible to all RTLB cluster schools and Kura including Kāhui Ako and other cluster groups.
- The service contributes to positive outcomes for mokopuna, kaiako, and whānau, and builds system capability for inclusive and Te Tiriti honouring practices within and across RTLB cluster schools and Kura.

Success measures

- The service works collaboratively with the Ministry and other education providers to:
  - identify local needs, including those identified through learning support registers, and think collectively about how to best use available resources to build on existing good practice and provide innovative solutions in ways that work for families and whānau and their mokopuna.
  - plan the best way to use their resources to effectively respond to the needs of children and young people whilst strengthening the confidence and capability of adults.
  - address learning support needs of mokopuna, kaiako and whānau in line with Te Tūāpapa o He Pikorua
- All RTLB cluster schools and Kura including Kāhui Ako and other clusters:
  - know how, why, and when to access learning support through the RTLB service.
  - have equitable access to the full range of RTLB services and funding.
  - use the service and value the service provided.
- Within available resources clusters work to actively manage workloads and avoid or minimise wait times.
- The service is based on a comprehensive needs analysis, is strategic and planned.
- In addition to the cluster satisfaction survey clusters use a survey on closure to seek feedback from mokopuna, whānau, and educators at the end of service<sup>9</sup> and routinely use this feedback for service improvement.
- RTLB follow He Pikorua as their shared practice model.
- The service is well-documented; service outcomes are monitored, recorded, and reported in accordance with *Governing and Managing RTLB Clusters*.
- The service is continually improving, responsive, flexible and innovative.

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<sup>9</sup> Clusters have individual surveys at present but in the future some or all questions may be aligned across clusters.

## **Lead school boards' obligations and responsibility as the employer of all RTLB**

All RTLB staff are employed by the lead school board but may not necessarily be based in the lead school board's grounds. It is therefore important that the board gains assurance that its obligations and responsibilities to its RTLB employees are being carried out.

As part of the quarterly reporting across the year the Board should be informed on:

- the recruitment and resignation of staff
- that all staff have job descriptions and are being appropriately inducted
- that all staff are employed under the appropriate collective agreements or individual employment agreements.
- the process used, and general information about matters such as conduct and competence processes, teacher practising certificate renewals, and professional development for RTLB that contribute to improved outcomes.
- matters relating to the health and safety, and well-being of this specialist group of staff irrespective of what school they are working in.

## **Employment advice for lead schools**

The Ministry funds NZSBA to provide RTLB specific employment advice to boards and lead schools can contact NZSBA directly for this advice. Some processes including the establishment of a new lead school involve the Ministry and NZSBA working closely together.

## **Recruiting and appointing the lead school principal and cluster manager**

The board has a key role when appointing a new lead school principal. It is recommended that the Ministry's Manager Integrated Services or a delegate is on the appointment committee.

The board must ensure that responsibility for the RTLB service is included in the advertisement and should consider if an applicant is an experienced principal, leader and manager with the experience, skills and commitment to manage both the school and the RTLB service. It is likely that a first time principal or a teaching principal would find this dual position challenging.

The board, along with the lead school principal:

- employ the cluster manager.
- appoint a full-time acting cluster manager when the cluster manager is unable to fulfil the role, for example when they are on extended leave or secondment.
- allocate leadership payments to the cluster manager and/or any RTLB with designated responsibility for providing leadership including practice leaders.

## **Reference checking**

School boards, as the employer of all staff, are responsible for being assured that the key requirements of the Children's Act (CA) 2014 are implemented and maintained as part of their recruitment and employment processes.

Visit the NZSBA website for details [New Zealand School Trustees Association — Our Organisation \(nzsba.org.nz\)](http://www.nzsba.org.nz)

It is a requirement under the Education and Training Act 2020 that the Teaching Council obtains a Police Vet before registration/granting of the Certificate.

A current Practising Certificate is evidence that a police vet has been done. Cluster schools are correct in wishing to see the evidence (and taking/validating a copy of it for their records) for those RTLB who work in their schools. Lead school principals should provide an assurance to the board annually that all RTLB have a current practising certificate. This may require a risk assessment for a more thorough safety check. [Help for Boards \(nzsbaresourcecentre.org.nz\)](http://www.nzsbaresourcecentre.org.nz)

If the preferred applicant comes from another RTLB cluster, lead schools are expected to obtain reference checks from the previous lead school and cluster manager.

### **Professional Growth Cycle**

The board is responsible for ensuring the cluster manager and each RTLB participate in a robust professional growth cycle designed using elements A to F.

- A. Principals and professional leaders will facilitate a common understanding of the Standards or Paerewa in their own context and what meeting and using them in their practice looks like (Not annually but once in place revisit from time to time and with new teachers to the setting).
- B. Principals and professional leaders will design with teachers an annual cycle of professional growth in their setting, using the Standards or Paerewa and support teachers to engage in it, fostering an environment for inclusive, collaborative teacher learning.
- C. Every teacher will engage in professional learning using the Standards or Paerewa to advance their understanding of the relationship between their professional practice and outcomes for learners.
- D. Every teacher will be given the opportunity to discuss and receive feedback on their practice including observation, particularly for teachers holding Tōmua practising certificates (provisionally certificated teachers).
- E. Principals and professional leaders will confirm annually that each teacher has participated in the annual cycle and will also provide a statement to the teacher about whether they meet (Tūturu: Full Practising Certificate) or likely to meet (Pūmau: Subject to Confirmation) the Standards or Paerewa (but with no requirement to create evidential documents) or
- F. If in the Principal or professional leader's judgment the teacher does not currently meet the Standards or Paerewa, they will discuss that with the teacher and provide support to enable improvement and if sufficient progress is not made, they may commence formal performance management processes outlined in employment agreements. Note that in these situations the Council's registration and certification policy will set out the expectations for the endorsement of a practising certificate renewal.

More information [Professional Growth Cycle: Teaching Council of Aotearoa New Zealand](#)

### **Conduct and Competence**

The lead school board is the employer of all RTLB in their cluster. Boards must know and understand their responsibility for the health and safety of all mokopuna served by their RTLB and the requirements for mandatory reporting to the Teaching Council, when this needs to occur, and the process for reporting.

The lead school board should understand and be assured of the health and safety, and well-being of their RTLB through the regular termly reporting process to the board. Boards must be well prepared for their role and be prepared to use external support, such as the New Zealand School Boards Association (NZSBA) in employment matters to ensure that correct processes are followed. Employers, and those advising them, need to put the safety of students first by meticulously complying with the legislation.

The **mandatory reporting requirements** can be found on the Teaching Council website [here](#).

To contact the Council use <https://teachingcouncil.nz/contact-us/>, you can request to speak to a member of the team who can provide support if unsure about reporting a concern.

## Use of funding

The Board will use the RTLB funding solely for the purpose of providing the RTLB Service as described in Schedule 2 of the funding agreement.

- a) The Board acknowledges that it is receiving public funds appropriated for the purpose of providing the RTLB Service and will ensure that the funds are used prudently and only for that purpose. Unless the Ministry consents in writing to surplus funds being used by the Board to support RTLB service after the period of this agreement, all surplus funds must be returned to the Ministry.
- b) The Board should work to use allocated resources with-in the term of each funding agreement and note that the Ministry may manage surpluses in the year following the completion of the funding agreement.
- c) At the end of each funding agreement and based on the relevant financial reports, the Ministry will inform clusters how any accumulated surplus funds will be managed. Lead schools must retain surpluses and note that decision-making about the use of surplus funds sits with the Ministry, until advice to the contrary is received.
- d) The Board will manage its budgeting, expenditure, delegation, and accounting in the normal manner. The regular audit of the Board's accounts will cover the use of RTLB Service funding.

The board is responsible for the RTLB funds on behalf of all the cluster's schools/Kura. The Crown Entities Act 2004, subpart 3, means that Ministry funding must be paid into the bank account of the RTLB lead school as the board of each individual school is a Crown Entity in its own right. Funds must not be paid into the account of the RTLB cluster. This applies to operational grants, IYT programme delivery expenses and study grant travel contributions.

The board is responsible for:

- ensuring there are transparent, needs-based processes for allocating RTLB Learning Support Funding (RTLBSF) to cluster schools.
- reporting at least two times a year to cluster schools/kura on the use of cluster funds and the allocation of the RTLB staffing resource.
- budgeting including budget approval, expenditure and accounting; ensuring funds received on behalf of the cluster are clearly identified separately in the lead school's/kura financial statements.
- ensuring robust accounting practices for the use of RTLB funds. Assets purchased by the RTLB should be recorded in the asset register of the lead school and identified as RTLB resources for their exclusive use.
- submitting an annual report of the cluster's financial position to the Ministry using the Ministry's RTLB financial reporting template (by 31 June) aligned with the figures in the lead school's audited accounts.
- returning surplus operational funds to the Ministry after the end of the period of the Funding Agreement unless the Ministry consents in writing to surplus funds being used by the Board to support the RTLB service.

- Lead schools can contact their regional financial advisor for financial advice.

### Lead school costs charged to the RTLB cluster

RTLB funds are provided solely for the purpose of providing the RTLB Service. Operational costs such as heat light and water, and cleaning are part of the lead or host school's operational grants. The cluster manager and lead school principal may agree on RTLB funding to be paid to the lead school cover actual costs such as time for payroll and finance roles. Any payments requested need to be reasonable and manageable within the clusters administration and lead school grants without limiting cluster operations. Refer to page 26 for more information.

## Robust cycles of cluster review and analysis, planning and reporting

The lead school board is responsible for ensuring there are effective systems to support RTLB service provision in cluster schools. The lead school board is also responsible for signing off and approving the cluster strategic plan and annual action plan and annual report. They must:

- be assured that cluster systems reflect whānau and iwi needs and aspirations.
- ensure the school has effective employment systems to support the RTLB workforce.
- submit the strategic plan and annual plans to the Ministry within expected timeframes using the current year template.
- submit an annual report on the operation of the RTLB service for each year including an evaluation of goals set in the annual plan.
- submit a financial report, to the Ministry within expected timeframes using the Excel template, including the details required on each tab. These figures should align with the lead school's audited accounts.
- report twice a year to cluster kura/school boards on the use of RTLB student support funding, RTLB staffing levels and RTLB service outputs and outcomes.
- submit a celebrations, risks and issues report twice yearly to the Ministry.

They may also organise regular cluster peer reviews.

The purpose of cluster self-review, data analysis and planning and reporting is to maintain high quality and consistency of service delivery, and governance and management through ongoing cycles of service improvement. From time to time the Ministry may also require a report on a particular activity associated with this Agreement. The lead school will provide such reports within the number of days specified in the request (*see pages 22-31 for more detail*).

Planning and Reporting Schedule		Due Date
<b>Strategic and Annual Plan and Annual Report</b>	Submitted to <a href="mailto:RTLB.Enquiries@education.govt.nz">RTLB.Enquiries@education.govt.nz</a>	1 March each year
<b>Annual Report (Financial)</b>	Submitted to <a href="mailto:RTLB.Enquiries@education.govt.nz">RTLB.Enquiries@education.govt.nz</a>	31 June each year
<b>Half-yearly Report</b>	Submitted to all cluster schools and kura boards. Shows use of staffing entitlement, service use patterns, outputs and outcomes. Allocation of student support funds across cluster schools and kura, and service issues of interest to key	End of Week One, Terms 1 and 3

	stakeholders. This report can be copied to Ministry national office.	
<b>Risks/issues/celebrations log</b>	Used by the cluster ongoing to track and manage risks and issues and successes. It is submitted to the Ministry twice a year, once at the end of week one Term 1 and within the cluster annual report.	End of week one Term 3 and in annual report
<b>Cluster school-gate data</b>	Some data fields are routinely downloaded to the Ministry so they can respond to national data requests.	End of Week One each term

# EFFECTIVE MANAGEMENT FOR CLUSTER LEADERSHIP TEAMS

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## Personnel Management

The success of RTLB service provision rests on the quality of RTLB professional practice. Lead schools are responsible for managing the RTLB workforce so that mokopuna, kaiako and cluster schools receive a quality service that meets their needs. It is vital that within each RTLB team there are RTLB who can work effectively within all learning settings including Kura Kaupapa Māori and Māori medium settings and secondary school settings.

## Recruiting and appointing Practice Leaders and RTLB

The Education Gazette includes information on [obligations when advertising teacher or principal vacancies](#).

The lead school/Kura principal/tumuaki, in collaboration with the cluster manager, is responsible for the recruitment and appointment of RTLB staff within the staffing entitlement included in Schedule 2 Part 2 of the Funding Agreement or annual variation. Other key stakeholders may be co-opted to the appointments panel.

Appointee must:

- be experienced, fully registered teacher/kaiako (not provisionally registered)
- hold a current practising certificate.
- be able to meet the experienced teacher standards including the competencies in [Tātaiako](#).
- have attained the Post Graduate Diploma in Specialist Teaching endorsed in Learning and Behaviour from Massey or Canterbury University **or**
- have attained the previous RTLB qualification prior to 2012 - the Post Graduate Diploma in Special Needs Resource Teaching (PG Dip SNRT), or the Post Graduate Certificate in Education Studies – both issued by the Auckland/Victoria/Waikato consortium of universities **or** have attained the necessary university pre-requisites to enrol in the Postgraduate Diploma in Specialist Teaching: Learning and Behaviour at Massey University, and be capable of attaining the qualification within 48 months of initial appointment as an RTLB.

**Note:**

- *To enrol in the PG Dip in Specialist Teaching, an RTLB needs to be a university graduate ie must hold a university degree or the equivalent.*
- *Appointees who hold an historic Ministry exemption from study and who may have worked in another RTLB cluster are required to attain the Post Graduate Diploma in Specialist Teaching endorsed in Learning and Behaviour.*



## **Process**

The employment process, requisite steps and resources can be found on the New Zealand School Boards Association (NZSBA) website for NZSBA [New Zealand School Boards Association — Our Organisation \(nzsba.org.nz\)](http://www.nzsba.org.nz)

## **Appointments**

An RTLB can be appointed to a full-time or part-time position, but preference should be given to filling the roles with full time staff. The teachers' collective agreements allow for job-sharing of permanent RTLB positions. A permanent full-time RTLB position can be shared by two RTLB in a job-share arrangement. Note if one resigns the remaining employee is entitled to the rest of the position.

RTLB in a job share or part-time arrangement cannot individually be employed for less than a 0.4 FTTE position.

## **Permanent/fixed term positions**

Lead school principals and cluster managers need to be guided by the terms and conditions of the collective agreements on these matters (around employment decisions). Employers need to get advice on any fixed term appointments to protect insurance cover. Where you are proposing a fixed term appointment you should contact the NZSBA Advisory and Support Centre on 0800 782 435. Fixed terms must only be used if there are genuine reasons.

## **Employing teachers who are qualified RTLB or who are working as an RTLB i.e. they have a caseload**

Teachers who have attained the *Postgraduate Diploma in Specialist Teaching (Learning and Behaviour)*, or who have been exemption by the Secretary for Education can be appointed to the position of RTLB. RTLB are identified in the payroll system with by the designation code S23 and Cluster Managers with code S68. These teachers are entitled to receive one management unit (\$4,500 per annum for Primary and \$5,000 per annum for Secondary) and the Special Duties Allowance (SDA). The rate of the SDA is determined by their current position on the salary scale. Staffing use will be charged against the lead school's RTLB staffing entitlement.

## **Employment agreements**

RTLB may be employed by a lead school that is a primary, area or secondary school/Kura under the relevant teachers' collective agreement(s) of their lead school, or on an individual employment agreement based on the relevant collective agreement.

If the appointee comes from another RTLB cluster where they were employed under a different collective agreement this process is managed by the Employment Relations Team in the Ministry of Education National Office.

## **Practice leadership positions**

A practice leader is an RTLB who has additional delegated leadership responsibilities within a cluster. As a practising RTLB, a practice leader must be a New Zealand fully-registered teacher/kaiako with a current practising certificate. As practice leader responsibilities attract one or more leadership payments of \$2,000, vacant positions should be advertised and appointments may be fixed term or permanent.

## **Managing Staffing**

### **Annual RTLB FTTE allocations**

The Ministry distributes the available RTLB FTTE to clusters for a calendar year. The national available RTLB FTTE is based on school rolls for years 1 to 10 (in the July roll returns), and a ratio of 1:633 as determined by the School Staffing Order. From 2012 to 2021 RTLB FTTE

increased as a result of roll-growth but in 2022 and 2023 reducing rolls reduced the FTTE generated.

Cluster level distribution is not purely determined by school rolls. The cluster staffing formula and wider judgements inform the cluster decisions, which are signed off by the Deputy Secretary Te Pae Aronui. For equitable distribution the cluster staffing formula is designed to anticipate relative needs across clusters, based on rolls in years 1 to 10 weighted for Māori and Pacific rolls, the equity index and the isolation index. Cluster staffing judgements take into account a range of factors including historic decisions and consistency of decision making across clusters.

### **Annual staffing notifications**

Where FTTE is not indicated to reduce for the following year clusters are notified of their staffing and leadership payments annually in October. This advice is provided either in a new funding agreement (schedule 2 part 2) or in an annual variation. Once approved and notified RTLB staffing is loaded into Pourato.

If a cluster may reduce for the following year the notification is provided earlier in the year. In line with the Primary Teachers Collective Agreement (Appendix 5) the Ministry must notify employing Boards, NZSBA and NZEI of possible RTLB overstaffing early in the year prior to the change. Initial letters go out at the end of May to notify of a possible reduction and in September any changes are confirmed.

### **Managing RTLB surplus staffing**

Staffing reductions for clusters are rare. There is guidance in the Primary Teachers Collective Agreement on how surplus staffing is managed and NZSBA should be contacted if surplus is not able to be met by attrition.

### **Leadership payments**

The provision of 'leadership payments' was negotiated as part of the Collective Agreements leading up to the RTLB transformation in 2012. Schedule 2 Part 2 of the RTLB Funding Agreement specifies the number of RTLB leadership payments available to the lead school/Kura board to allocate to the cluster manager and/or any RTLB with designated responsibility for providing leadership.

### **Cluster Managers**

One cluster manager FTTE is allocated to each cluster. The number of cluster managers (40) does not change year-on-year.

### **Banked staffing**

RTLB staffing cannot be banked as part of the lead school's banked staffing process. The RTLB staffing entitlement cannot be included in the lead school's banked staffing because RTLB are attached teachers and not part of a lead school's total regular staffing entitlement. RTLB staffing is excluded from the traditional school settlement process.

### **Managing un-used RTLB staffing entitlement**

The RTLB resource has been appropriated for the specific purpose of employing RTLB teachers. However not all RTLB positions are filled all of the time. This can be due to a variety of reasons including:

- the time taken for the recruitment process.
- non appointment due to notice of possible staffing reductions in the following year
- a lack of suitably qualified staff applying for positions
- staff taking *Leave Without Pay (LWOP)*.

These situations can result in clusters under-using their RTLB staffing entitlement. There are two ways in which you can manage your RTLB staffing to get the most out of your entitlement.

Like your non-RTLB banking staffing, you can overuse your RTLB staffing entitlement to balance any underuse that you have accrued during the year. This is with the proviso that at the end of the year your RTLB banking staffing usage does not exceed your entitlement.

In cases where you cannot appoint an RTLB teacher you can use your RTLB staffing entitlement to employ non-RTLB teachers. These teachers should be undertaking work that benefits the RTLB service and consequently the schools and mokopuna within the cluster.

RTLB un-used staffing cannot be used to employ staff other than teachers. Positions must be fixed term, long term relievers (LTR) from .2 to full time. You should contact NZSBA for advice on these appointments.

Employees must hold a 'Provisional', 'Subject to Confirmation', or 'Full' Practising Certificate.

### **Employing non-RTLB teachers utilising un-used RTLB staffing entitlement**

Teachers or kaiako who are employed to support the work of the RTLB team and who are not trained to undertake casework are coded as S12. This staffing use will be charged against the lead school's staffing entitlement. The lead school contacts Ministry of Education Resourcing requesting the staffing use be charged against the lead school's RTLB entitlement. These teachers will not receive the management unit and Special Duties Allowance (SDA).

### **Guiding Principles**

Key principles to guide you when considering employing non-RTLB teachers utilising un-used RTLB staffing entitlement are:

1. The board through the lead school principal and cluster manager has a responsibility to:
  - manage the RTLB workforce so that students, teachers, and cluster schools receive a quality service that meets their needs.
  - employ RTLB who are able to provide an effective service for all students, in all school/Kura settings.
  - manage resourcing in a transparent and needs-based manner.
2. The cluster's schools and students must benefit either directly or indirectly from the employment of staff.
3. The RTLB cluster's capacity to provide a service to schools within the cluster is enhanced.

### **Examples**

Below are examples of some of the roles of teachers employed using un-used RTLB staffing:

- Organising and/or facilitating Professional Learning and Development (PLD) opportunities for RTLB and cluster schools' staff in e.g. Restorative Practice (RP); supporting students with dyslexia; or Autistic Spectrum Disorders (ASD).
- Providing 1-to-1 counselling or completing psychological assessments of students. These teachers would hold appropriate qualifications over and above their current teachers' practising certificate.
- Facilitating mentoring programmes for individual students on an RTLB caseload.
- Completing assessments to contribute towards Gateway Assessment Education profiles.
- Supporting RTLB with aspects of the RTLB practice sequence e.g. completing observations and assessments.
- Organising and/or facilitating specialist programmes that support students to re-engage with their learning e.g. SPEC.

- Providing lead school principal release to enable them to engage with RTLB related activities e.g. accompanying cluster managers to principal network meetings.
- Inputting data into the cluster's database.
- Completing a stock take or cataloguing cluster resources.

### **Additional relief teacher funding**

ARTF is claimable where your school has incurred double costs due to hiring suitable relief cover while the absent RTLB is on paid sick leave. Sick leave includes dependant sick leave. ARTF may be provided from the first day of absence for an RTLB if the sick leave is for more than one week.

Additional Relief Teacher Funding (ARTF) is an application-based process. Schools apply for ARTF through ERS [The Education Resourcing System \(ERS\) | Applications & Online Systems](#)

Reliever for RTLB teachers, when the RTLB is not on leave-without-pay, should be coded as S23 against the school's bulk grant.

Reliever for RTLB teachers, when the RTLB is on leave-without-pay, should be coded as S23 against the RTLB Teachers Salaries.

If you have any trouble using ERS or getting access you can contact the Ministry's Contact Centre at 04 463 8383 or use the guides available online. [ARTF and RTLB](#) and [Additional relief teacher funding – Education in New Zealand](#)

### **Accident Compensation Corporation claims**

ACC reimbursement is 80% of the RTLB assessed salary. Information on who receives the ACC payment and how the reimbursement may be used is available on the Resourcing funding page: [Accident Compensation Corporation claims](#).

Lead schools can charge RTLB relievers to bulk grant. This will give lead schools the flexibility to use the cash reimbursement directly to help pay for the reliever brought in to cover for RTLB who is absent due to an accident.

### **Classroom Release**

As RTLB do not have a "classroom", Classroom Release Time (CRT) is not a relevant provision of the Primary or Secondary Teachers' Collective Agreements for this group of employees. Nor does non-contact teaching time apply as per the Area School Teachers' Collective Agreement.

## **Managing Cluster Finances**

### **Revenue**

RTLB funds provided by the Ministry are GST inclusive, the same as other school operational grant funding. The budget for RTLB grants increases each year through a percentage increase.

	Grant	Income rates
<b>Operational funding</b>	Administration	Calculated at a Ministry-determined rate per RTLB FTTE per year.
	Lead School	Calculated as 11 percent of the Administration Grant.
	Travel	Calculated on the historical grant plus % increase plus increases or decreased for FTTE changes.
<b>Student support funding</b>	Learning Support Fund	Calculated at a grant rate based on the available budget and FTTE in each cluster.

<b>One-off funding</b>	Furniture, Fittings & Equipment	Entitlement to furnish and equip new RTLB space as determined by the local school Property Advisor
	Study Award	As determined by the Ministry's Study Awards team

## Expenses

RTLB funds must be used for the purpose for which they are granted. There is no restriction moving funding from Travel, Administration and Lead School grants to another RTLB grant category. Operational funding can be moved to learning support funding, but not vice versa. Any movement of funding from one grant to another must be clearly accounted for in the RTLB Annual Financial Report.

	Grant	Purpose
<b>Operational funding</b>	Travel	For vehicle leases; travel reimbursements for RTLB; cluster manager and lead school principal travel while on RTLB service work.
	Administration	For network, telephone lines; laptops leases; mobile phones; photocopying; stationery; consumables; resources; RTLB professional development; supervision; administration and finance support (personnel); accommodation and host school costs as specified in the POD.
	Lead School	For payments to recognise the additional work lead schools do supporting the RTLB service on behalf of other schools. For example: <a href="#">Ministry-approved principal concurrence</a> ; additional 3R payments; additional leadership payments <sup>10</sup> .
<b>Student support funding</b>	RTLB Learning Support Fund (RTLB LSF)	For payments made to cluster schools and others to support RTLB case work, targeting Years 1-10 at the Te Matua (universal), Te Kāhui (targeted) and Te Arotahi (tailored) levels.
<b>One-off funding</b>	Furniture, Fittings and Equipment Grant	New RTLB space generates a Furniture, Fittings and Equipment funding entitlement (FF & E) to furnish and equip the new space. <a href="#">Furniture and equipment funding for state schools – Education in New Zealand</a>
	Study Award	Supports RTLB in training and contributes towards the study-related travel and accommodation expenses incurred during the year <a href="#">Resource Teachers: Learning and Behaviour Study Award – Education in New Zealand</a>

The Ministry's financial advisors are available to support clusters with their financial tracking and reporting obligations. Contact details can be found [here](#).

<sup>10</sup> In accordance with the relevant collective agreement.

## Requesting additional funding

*Additional funding for heating, lighting and water:* In exceptional circumstances, lead schools can apply for a review of their heat, light and water funding allocation. For more information visit [School operational funding: Heat, light and water allocation page](#).

## Managing service to each cluster school and kura

The cluster manager is responsible for the delivery of services to all cluster schools and for reporting to cluster schools every 6 months. Each school in the cluster also has a liaison RTLB. The liaison function is one of the ways to maintain easy access and positive working relationships between schools and the RTLB service.

The liaison RTLB:

- is a consistent conduit for information from the cluster and the school
- is a first point of contact for staff
- develops positive, on-going and sustainable relationship between the school and the RTLB service
- supports schools to respond to needs including Requests-for-Support using Schoolgate database
- supports schools with inclusive education practice to meet the needs of all learners.

The liaison RTLB is a visible, accessible and quality service that provides opportunities for formal and informal problem solving with designated schools. Liaison response to schools is negotiated, agreed, needs based, and aligned to cluster policies.

## Managing Travel

### Reimbursement of travel costs using private vehicles

Lead schools reimburse RTLB for any own-car, work-related travel from the RTLB Travel Grant. RTLB are not reimbursed for travel from home to normal office/base or vice versa.

When boards reimburse own-car travel, they use the motor vehicle rate specified in the relevant teachers' collective agreements. Collective agreements are 'actual rate' documents in terms of Section 75 of the State Sector Act 1988. The reimbursement rates increased in 2023 and are intended to cover all vehicle running costs such as car insurance, registration, warrants of fitness and servicing.

### Insurance for private vehicles used for cluster work

Clusters should note some insurance companies will not accept claims under personal insurance policies where the car is being used as a 'tool of trade'. RTLB should be advised to insure private vehicles so that they are covered in the event of an accident during the course of their work as an RTLB.

### Leasing or purchasing vehicles

Clusters may lease or purchase vehicles to reduce the wear and tear on personal vehicles or to make the most efficient use of funding.

The lead school must manage tax liabilities where lease or cluster-owned vehicles are used for non-work purposes. Private use of lease or cluster-owned vehicles may generate fringe benefit tax.

## Managing RTLB Accommodation

The lead school, in collaboration with the Ministry office, will ensure RTLB staff are housed in suitable accommodation. RTLB are generally accommodated in existing (surplus) space within cluster schools (lead school or host school) to cover geographical areas across the cluster and reflect the service's close connection to cluster schools. Occasionally clusters occupy Ministry leased premises (onsite or off site) or work from a non-school site such as a resource centre that is shared with other groups.

There is no requirement on the part of the Ministry to move all RTLBs onto a single school site, but this can be considered where there is a strong case for improvements and costs can be managed.

When a new lead school is selected the RTLB generally stay in their current location(s), but the POD may be updated to reflect the change.

### **The property occupancy document (POD)**

A third-party Property Occupancy Document (POD) is required when RTLB are accommodated on a host school site. It is an agreement between the lead school and host school using a standard Ministry property occupancy format. A POD is now needed when RTLB are accommodated on their lead school site.

Negotiating the POD agreement is an opportunity to strengthen the partnership between the two schools and agree on and document the building/room used and any funds payable by the lead school to the host school.

The cluster manager and lead school principal maintain regular communication with host schools/kura and, in collaboration with the Ministry's local Property Advisor, from time to time may review the POD to ensure it continues to meet the needs of the RTLB service and the host school.

A new or revised POD agreement may be needed when:

- a new lead school is selected
- the host or lead school wishes to discuss the terms of the agreement including an intent to reoccupy property in use by RTLB
- a new host school has been selected
- at regular agreed intervals over time
- there is an agreed plan to move RTLB host school locations.

### **Terminating the POD agreement**

- Once a POD Agreement is signed, the RTLB facilities, whilst part of the host school's property, are for the use of the RTLB service. Any changes to the use of the facilities can only be made with the agreement of the lead school, the host school, and the Ministry. The first step would be for the host school principal to talk to the lead school principal and the Manager Integrated Services. They will advise the school property advisor of the plan to review the agreement.
- If a dispute around the POD variation/ MOU arises between the two schools the Ministry of Education will assist in resolving that dispute or assist with finding alternative solutions.

## **Process**

The process to develop or update a POD agreement is:

- the host or lead school principal makes a request, and this is confirmed as a reason for a new POD or a review by the lead and host school
- the school Property Advisor is informed
- the current POD agreement is shared
- a meeting is convened to discuss requested changes and consider a range of options. If the request is to reoccupy RTLB space in the host school then the meeting must be attended by the property
- Property Advisor and the Manager Integrated Services invited or informed
- following the meeting further work may be needed to consider options
- once agreement is reached the POD agreement is updated and signed by both parties or terminated if the cluster can move
- the lead school shares the signed agreement with the Cluster Manager
- the POD is submitted to the Property Advisor where it is saved in K2.

### **Key decision makers and considering options for a new host school**

Generally the main parties to a POD discussion are the lead and host school principal.

But if the proposal is to change RTLB accommodation the key decision makers are Te Mahau, the Property Advisor (lead), lead school principal, Manager Integrated Services (MIS) and the current host school principal. The Ministry leads the process to consider options to move RTLB accommodation.

Decision making should identify a range of solutions to meet school and cluster needs, to minimise costs, reduce the need for travel and maximise service access and effectiveness. Depending on the available options the decision may be for RTLB to stay with the current host school or move. Options should be prioritised as follows:

- maintaining at current host school and addressing demand for space such as roll-growth in other ways
- existing space in cluster schools is the preferred option. This can be refurbished and upgraded to meet cluster needs
- where suitable surplus space is not available in a cluster school consideration may be given to building additional space in a cluster school
- once these options have been exhausted, alternative locations may be considered. These would need to be finally agreed by School Property and Te Pae Aronui Learning Support.

### **Agreeing on funds payable in the POD agreement - if any**

There is no requirement for lead schools to pay funds to host schools as costs are largely covered in existing host school grants (refer school-based accommodation costs below).

Payments can be included in the POD by agreement and parties can agree on standard charges or actual and reasonable costs, but not both. The RTLB Cluster may make a donation to the school if they wish to, but this will not be included on the POD Variation.

- Standard charges may be set at a notional level. This payment could be up to \$100 per RTLB per term. This covers photocopying, staffroom costs and other incidental expenses.



- Actual and reasonable costs must be negotiated, agreed, and signed off by both schools before submitting the application to the local Ministry office. They cannot include charges for costs already paid to the host school like heat, light and water and property maintenance, or parking or any rent or lease.

### **School-based RTLB accommodation costs**

Online information is available about RTLB accommodation [RTLB – Education in New Zealand](#)

#### Host school property funding

- The host school will receive 5-year agreement (5YA) funding for RTLB spaces (up to 15 square metres of space for each RTLB onsite RTLB) and RTLB spaces should be included in the 10 year property plan (10YPP) review process. Any ongoing capital maintenance work will need to be funded from 5YA.
- Heat, light and water (HLW). If the costs of HLW increase as a result of hosting RTLB, a host school/kura can apply to resourcing for an increase to heat, light and water grant [here](#).
- Property Maintenance Grant (PMG). The host school is responsible to continue to upkeep the buildings using their PMG; this includes exterior painting, internal/external cleaning, building repairs and grounds maintenance.
- Vandalism grant – host schools will cover vandalism through the vandalism grant.
- Building insurance is covered through the Ministry's [School Buildings Insurance Programme](#).

To read more about capital upgrades and 5 Year Agreement (5YA) funding check [here](#).

### **Furniture and Equipment (F&E) Grants for RTLB accommodation**

Newly provided RTLB space generates an F&E funding entitlement to furnish and equip the new space. The regular funding rate of \$125 per square metre (net) applies. The net square metres exclude corridors, circulation space, toilets etc where furniture and equipment are not needed. <https://www.education.govt.nz/school/funding-and-financials/funding/furniture-and-equipment-funding-for-schools/>

The F & E Grant is paid to the lead school who will receive a budget allocation to modernise furniture and equipment based on the amount of 5YA funding. The F & E grant is paid in addition to the RTLB administration grant and is advised by the school's property advisor.

Additional property information can be found [here](#).

## **Managing planning, review and reporting**

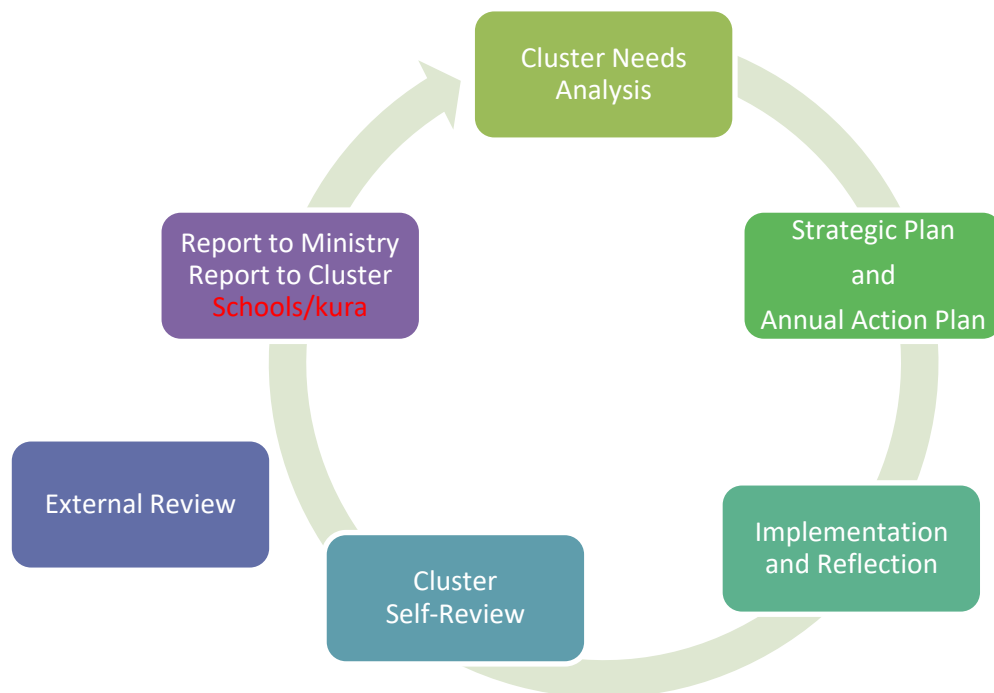
Every cluster has a continuing and regular annual planning, review and reporting cycle that supports service development and improvement.

Planning and self-review involves key stakeholders and focuses on the processes and outcomes for students, whānau and educators and considers:

- current national and local educational priorities
- the cluster's needs analysis which informs both the long-term strategic plan and the annual plan
- iwi education plan(s)
- kura/wharekura having equitable access
- school/kura/Kāhui Ako *request for support* patterns
- feedback from key stakeholders and the wider sector and community
- review of current policies, procedures and practice

- future practice, resourcing decisions, processes and approaches.

The diagram below is an example of a robust cluster planning, self-review and reporting cycle.



## Cluster needs analysis

The cluster needs analysis is a starting point for cluster planning. Every cluster plans annually to support the learning and behaviour needs of students in all cluster schools/kura.

### Roles

- The cluster manager leads this process.
- The cluster manager facilitates data collection.
- All RTLB are involved.
- Cluster schools'/kura stakeholder groups have input.
- Hapu and iwi and relevant agencies contribute.
- The local Ministry Learning Support office provides relevant data, information and support.

### Essential elements of a cluster needs analysis include:

- organisational infrastructure, processes and systems
- service development
- relationship development
- development of data and information gathering for planning and reporting
- evidence to inform future needs and direction.

### Essential information to collate and analyse includes:

- *requests for support* trends and patterns
- the impact of RTLB interventions on student learning outcomes
- student demographics in cluster schools/kura, for example, Māori, Pacific, secondary, attendance and standdown suspension and exclusion data
- national and local education priorities
- areas of RTLB specialist knowledge and skills
- workforce information including ethnicity, te reo Māori speakers and Pacific languages

- issues, complaints and other feedback from cluster stakeholders
- service satisfaction data from schools, students, whānau (national and closure survey<sup>11</sup>) to understand service strengths, opportunities and weaknesses.
- emerging needs in cluster schools/kura in relation to students requiring additional support to learn and achieve.
- aspirations of other key stakeholder groups, including hapu and iwi and Pacific groups.

## **Strategic and annual planning**

### **Roles within the strategic and annual planning process**

- The lead school/kura board presiding member is accountable for signing off the plan. Good practice would be for this to be done formally in a board meeting after robust discussion.
- The cluster manager is responsible, in conjunction with the principal/tumuaki, for the strategic direction and development of the plan.
- Key stakeholders contribute to the development of the plan.
- Practice leaders work with the cluster manager to develop the plan.
- The RTLB Executive has developed a Strategic Planning template that clusters may use but this is not a requirement.
- The Ministry provides templates each year including the annual plan, annual report, risks issues and celebrations and financial report.

### **Cycles and time frames**

The strategic plan is expected to have a three or five-year cycle. An annual action plan is developed each year to implement the strategic plan.

### **The strategic plan**

The strategic plan is future focused. It sets the 'big picture' and direction of the cluster and may span multiple funding agreements.

#### **Essential elements of the strategic plan include:**

- Vision
- Mission
- The cluster's aims, objectives, directions, priorities and targets
- A limited set of critical success factors
- A service development and improvement plan related to the critical success factors
- A review process.

### **The annual action plan**

The annual action plan describes the way the cluster will meet its objectives through detailed steps that describe key tasks/actions, evidence of outcomes and implications and opportunities for service improvement. It is operational, shorter-term and focused on implementation and aligns with the priorities and expectations set in the funding agreement.

#### **Essential elements of the annual plan include:**

- Specific objectives, tasks, roles, responsibilities, timelines and achievement indicators.
- Top five prioritised service development and improvement key issues:
  - what will be done to address them
  - who will address them
  - timeframes
  - risk management.
- Specialisation focus e.g. professional development – who, what, how.

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<sup>11</sup> All clusters are to use a closure survey from 2024 onwards.

- Goals that focus on Māori student achievement.
- Goals that focus on Pacific student achievement.

The plan may include an accompanying annual budget.

### **Implementation and reflection**

It is expected that the RTLB service, and the cluster will review and reflect on the implementation of the annual plan, in particular:

- the allocation and execution of tasks
- allocated roles and responsibilities
- timelines and the degree to which they were met
- all impacts and outcomes for mokopuna, whānau and kaiako within Te Tūāpapa
- outcomes for Māori
- outcomes for Pacific.

### **Cluster reviews**

Cluster reviews include self-initiated and externally initiated reviews. These reviews consider evidence of what has worked or not, whether outcomes have been achieved and any barriers. They also identify trends and future needs.

#### **Self-initiated review**

Cluster self-initiated reviews are part of an ongoing cycle of continual reflection and improvement:

- reflection on governance, management, RTLB practice and service provision
- review of operating systems, cluster policies, protocols, processes and procedures
- review of strategic planning goals
- review of outcomes for students

To ensure a self-initiated review identifies areas for improvement and development, a clear process provides an external viewpoint, impartiality and rigour to the review.

#### **Peer review**

A peer review is initiated and funded by a cluster. A peer review should be initiated at least once in each 3 to 5-year strategic planning cycle.

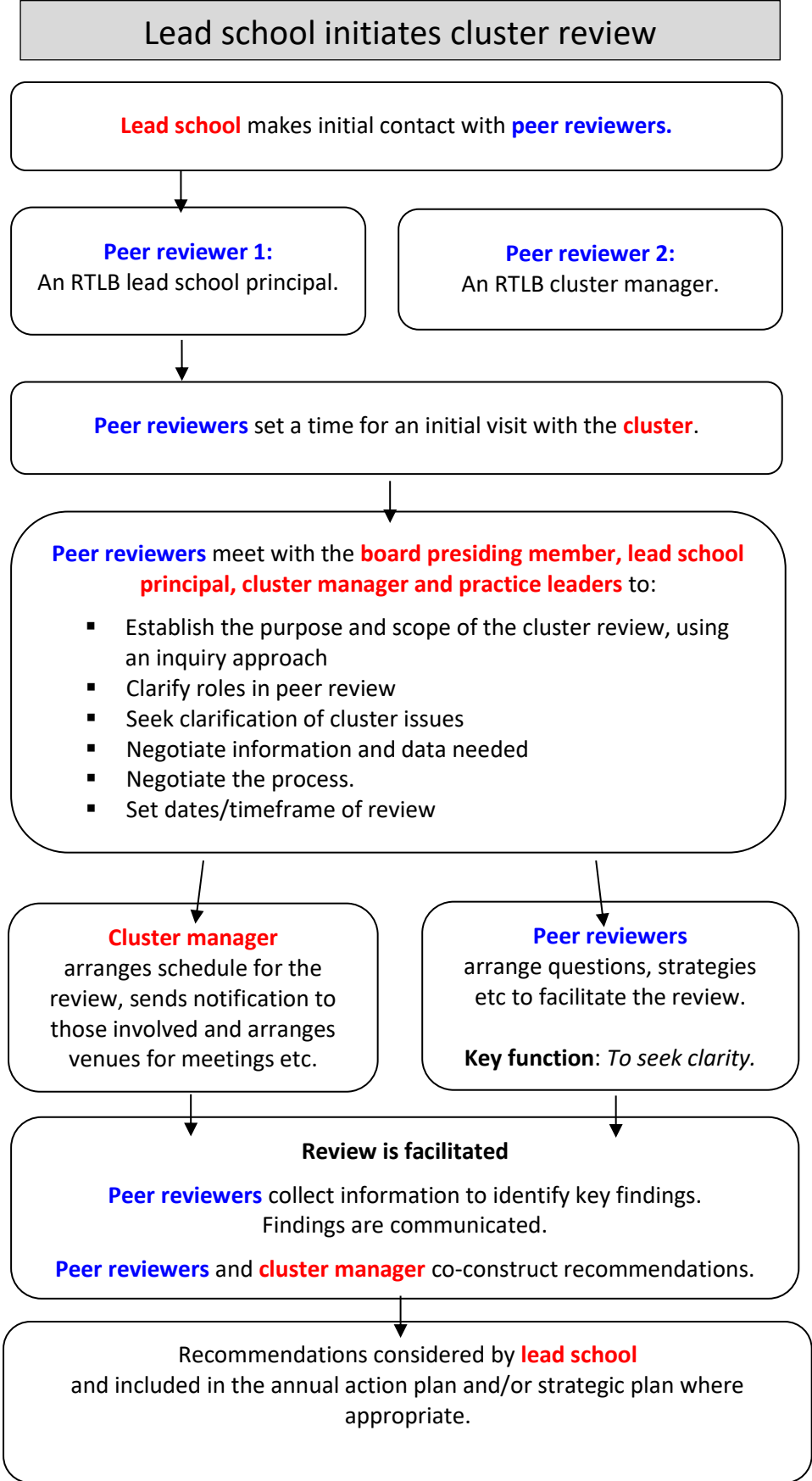
Peer reviewers - a principal and a cluster manager, preferably each from different clusters in other regions, help facilitate the peer review process.

The peer reviewers, in collaboration with the cluster, focus on:

- evidence of what is working
- what isn't working
- identifying constraints
- outcomes achieved
- trends and patterns
- identification of needs
- opportunities that exist
- recommendations for next steps.

The strategic plan may need to be adjusted considering this review. The following year's action plan should be developed after reflecting on the findings of the review.

The diagram below summarises a suggested **cluster self-initiated peer review process**.



Ministry Learning Support (National Office) may be consulted for advice on choice of reviewers.

Reviewers are preferably from outside the cluster's region - from two different RTLB clusters.

**This may be:**

- One-on-one interviews
- Group meetings
- Observations

**with:**

- RTLB
- Cluster school principals, SENCOs, parents

The **initial meeting** may take half a day.  
The **review** may take 2-3 days.  
The **'co-construction' meeting** may take half a day.

**Lead school reports on the self/peer review in the annual report:**

- Names of peer reviewers
- Outline of process
- Recommendations

## Externally initiated reviews

### Education Review Office (ERO)

Between 2004 and 2018 a series of ERO service reviews led to a service change programme (RTLB transformation 2012 to 2018) to improve service quality and consistency through better governance and management. The 2018 review found almost all clusters were well governed and managed. Past ERO reports are available on the ERO website, 2004 [ERO+report pdf](#), 2009 [Education Counts](#) and 2018 [RTLB-Evaluation](#)). Currently there are no further national ERO reviews planned.

School level ERO reviews are now event-based to support each school in a process of continuous improvement. These reviews may involve the RTLB service depending on the focus of the evaluation decided by the school.

### Ministry of Education

From time to time the Ministry may conduct a review of an RTLB cluster.

## Record Keeping and Cluster Reporting

### Record keeping

#### RTLB interventions

Cluster managers ensure RTLB gather and record evidence that demonstrates the effectiveness of their interventions and improved outcomes for students. RTLB collect and record data and information during involvement with individual students, groups of students and with schools. They use the data to analyse the effectiveness of the interventions and areas for practice improvement.

#### Data collection system

RTLB use the cluster's data collection system for recording case work and service outcomes. Cluster managers ensure that the data collection system gathers the specific data required by the Ministry and that it meets the necessary privacy and security standards, as described in the [New Zealand Privacy Act 2020](#).

Cluster managers ensure that the required data detailed in *RTLB Cluster Data and Ministry of Education Data Requirements* (2018) is available for the Ministry to extract on the reporting dates specified in the document.

#### Case file disposal

The lead school board is responsible for the provision of RTLB services for the cluster. Case file records are therefore the responsibility of the board of the lead school, including permission to destroy files. RTLB records fall under the auspices of the schools Retention and Disposal Schedule as "Student progress records (1.5)".

The disposal action for this class of records is to "Keep for as long as the school needs them for school business or reference purposes, then they may be destroyed with the permission of the board".

<https://www.education.govt.nz/school/managing-and-supporting-students/archiving-and-disposing-of-school-records/>

#### Access to ENROL

An RTLB role is available on ENROL, allowing cluster managers and practice leaders to search for a student's NSN when needed. This role can be found on the EPA screen, an online application where schools request access to MOE applications like ENROL for their staff. RTLB managers who would like access to ENROL will need to ask their host school's EPA authoriser (generally school administrator or principal) to request it for them via the EPA portal. Once the

Ministry Service Desk receives the request they will forward it to the MOE Principal Advisor, RTLB for approval.

**Please note:** ENROL is to be used only for its intended purposes. For cluster manager and practice leader users, this means only to find the National Student Number (NSN) of students receiving or about to receive RTLB support.

To find a student's NSN, enter their name and date of birth into the **Find a Student** tab of ENROL. ENROL will display a list of records found that match the details you entered. Copy and paste the NSN.

If you are unsure which record is the one you need, double-click on the NSN to find more details about the student, including which school they are currently attending.

**Find a Student**

**Search Criteria**

To find a student, enter either the student's National Student Number or First Name(s) and Surname.

National Student Number

or

Surname: Moana

First Names (incl. middle names): Lily

Date of Birth (Format DD/MM/YYYY)

Gender

School:  At my school  Not at my school

Also include archived students?

**Find a Student**

**Results**

1 student found.

NSN	Surname	First Names	Gender	DoB	Archived?
<a href="#">136913029</a>	Moana	Lilly	Female	8/02/2005	No

### Cluster operational document

Cluster managers maintain a cluster operational document, detailing cluster policies, procedures and systems. The document is updated regularly in response to lead school and cluster operational changes and developments.

## Cluster level reporting

At cluster level, data from the records of individual RTLB is collated and used to report on cluster work, funding and outcomes – refer to table on page 14 for all RTLB reports.

### Reporting to the lead school board

Regular reporting to the board keeps it informed so that it can effectively carry out its governance role. The RTLB strategic leadership and management team reports to the board **at least once a term** against the expectations of the RTLB Funding Agreement. See Appendix E for a sample template.

### Reporting to cluster schools/Kura

Reporting to cluster schools maintains the transparency of service provision and keeps cluster schools/Kura informed about how the RTLB staffing and funding resource is being used across the cluster.

Lead schools report **at least twice a year** (terms 1 and 3 or terms 2 and 4) to their cluster schools on the RTLB service for the previous two terms. Each lead school will determine its own style of reporting and the level of detail when it reports to schools/Kura. Sharing of cluster school reports with other key stakeholders is recommended.

To ensure transparency clusters are advised to include the following elements:

- the number of RTLB employed in relation to the cluster's RTLB staffing entitlement, including RTLB ethnicity
- the number of RTLB cases (individual student, group, individual school, group of schools/Kāhui Ako) in cluster schools
- case closure data including service outcomes, highlighting outcomes for Māori and Pacific students
- the number of RTLB cases (all types) supported by the RTLB Learning Support Funding (RTLB LSF)
- the percentage of the RTLB LSF utilised to date
- the number and percentage of cluster schools that access the service
- trends, patterns and service issues of interest to key stakeholders such as early learning to school transitions, work in Kura Kaupapa Māori and Māori medium settings, work beyond year 10, Gateway, Bilingual assessors etc.

## Cluster reporting to the Ministry of Education

The Ministry extracts case and project data each fortnight as described in the *RTLB cluster data and Ministry of Education data requirements*. Data is used for national reporting purposes and is accessed by analysts at a national and regional level.

Quality improvement processes should be in place to identify and correct data errors regularly, so the data accessed by the Ministry is correct. The Ministry regularly notifies clusters of data errors so these can be corrected where this is possible.

### Risks, issues and celebrations

This annual log covers the risks and issues the cluster is managing, in the course of their service provision to schools. It also lists cluster celebrations. Lead schools are required to submit this report twice a year to [RTLB.Enquiries@education.govt.nz](mailto:RTLB.Enquiries@education.govt.nz). This happens at the end of week 1 in Term 3 - covering terms 1 and 2, and as an attachment to the annual report - covering terms 3 and 4.



### **Strategic plan, annual plan for the current year and annual report for the previous year**

These plans and report are submitted annually to [RTLB.Enquiries@education.govt.nz](mailto:RTLB.Enquiries@education.govt.nz) by 1 March. Clusters may use the Executive template for their Strategic plan or use their own format. A template is provided for the annual plan.

### **Annual financial report to the Ministry**

The cluster annual financial reports are submitted to [RTLB.Enquiries@education.govt.nz](mailto:RTLB.Enquiries@education.govt.nz) by 30 June each year. They should be submitted on the Excel template provided which includes an analysis of variance. The signed RTLB Annual Report Declaration is submitted with the financial report. Financial reports should be submitted once the schools accounts have been audited so any changes made by the auditors are reflected in the more detailed RTLB financial report.

### **Sharing cluster reports with selected Te Mahau regional staff**

Cluster reports to the Ministry are filed and made available to the relevant Manager Integrated Services (MIS) and other regional staff by request.

### **Special reports**

Whenever the Ministry requests a special report on a particular aspect of the RTLB service, the lead school will provide such reports within a specified number of working days of the request being made. The timeframe may vary according to the complexities in gathering the required data or information.

## **RTLB Training**

RTLB must be registered teachers and hold the required RTLB qualification:

- PGDip in Specialist Teaching qualification Massey University (2021 onwards)
- Postgraduate Diploma (PGDip) in Specialist Teaching endorsed in Learning and Behaviour issued by Massey University or the University of Canterbury (2011 - 2020)
- one of the previous qualifications: Postgraduate Diploma in Special Needs Resource Teaching or the Postgraduate Certificate in Education Studies, issued by the Auckland/Victoria/Waikato consortium of universities (prior to 2010).

From 2021 Massey University is the sole provider of the PGDip in Specialist Teaching qualification for new RTLB. The content of the PGDip in Specialist Teaching endorsed in Learning and Behaviour is tailored specifically to the RTLB role.

Teachers appointed to permanent full-time RTLB positions must be eligible to enrol at Massey University and complete the Postgraduate Diploma in Specialist Teaching endorsed in Learning and Behaviour, unless they have:

- been given an exemption by the Secretary prior to the transformation in 2012 and remain employed by the same cluster; or
- already completed the programme.

Teachers required to complete the training programme are eligible for a management unit from the date they commence the role. Any teacher who withdraws from the training programme or does not complete the programme within 48 months of appointment to the role will cease to be eligible for the unit. Where an RTLB may not complete the training programme within 48 months of their appointment, lead school principals can seek advice about next steps from NZSBA.

RTLB must enrol with Massey University in the Postgraduate Diploma in Specialist Teaching endorsed in Learning and Behaviour. Applicants can apply through the [university's](#)

[website](#). They should follow the prompts provided by the university admissions system to supply the necessary documentation and complete the application by the due date.

**Note** the application for a study award (with the Ministry) and the application to enrol in the qualification (with Massey) are two separate applications.

### **RTLB Study awards**

Appointees enrolled in the Postgraduate Diploma in Specialist Teaching endorsed in Learning and Behaviour are eligible for the Ministry's RTLB study award<sup>12</sup>. If in any year the number of applicants exceeds the number of available awards, a prioritisation process will be used. Priority will be given in the following order:

- appointees who have one year to complete their training before losing their management unit
- appointees who have two years to complete their training before losing their management unit
- appointees who have three years to complete their training before losing their management unit
- the second RTLB appointee in a job-share position (if the other job-share partner has received the study award).

### **Support for Study**

Each cluster lead school is expected to support RTLB in their training by granting them study leave and reducing their workload as appropriate during the training period. The amount of study leave provided is at the employer's discretion. A suggested range for study release for the year is one day per week during the university semester in addition to the block course days. Detailed information on the Ministry's RTLB study award can be found [here](#).

### **Textbooks**

When an RTLB is in training, the cluster sets aside funds to purchase textbooks. These textbooks become a cluster resource.

### **If plans change**

If plans change once an RTLB has enrolled and received a study award the Ministry should be notified immediately by emailing the learning support study award team at [learningsupport@education.govt.nz](mailto:learningsupport@education.govt.nz) and RTLB Enquiries [RTLB.Enquiries@education.govt.nz](mailto:RTLB.Enquiries@education.govt.nz).

### **Requests for an exemptions or to defer study**

Each of the collective agreements differ in terms of coverage for RTLB training and exemptions. The Secretary's power to grant exemptions only applies to RTLB employed on the Primary Teachers' Collective Agreement or equivalent IEA. No training requirement exemption is available to RTLB employed under the Area School Teachers' Collective Agreement or the Secondary Teachers' Collective Agreement or equivalent IEA.

The Primary Teachers Collective Agreement (2023 to 2025) 3.6.5 (P15) states:

- a) Teachers appointed to RTLB positions will be required to complete the RTLB training programme, unless they have (i) Been given an exemption by the Secretary; or (ii) Already completed the programme.
- b) Teachers required to complete the training programme will be eligible for the unit from the date they commence the role.

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<sup>12</sup> Non-RTLB can complete the Postgraduate Diploma in Specialist Teaching endorsed in Learning and Behaviour but only RTLB qualify for a study award.

- c) Any such teacher who withdraws from the training programme or does not complete the programme within 48 months of appointment to the role will cease to be eligible for the unit.
- d) All teachers employed as RTLB will be automatically eligible for the unit if the training ceases to be provided.

### **Historical exemptions from the transformation of the RTLB service in 2011**

Some RTLB were granted an historical exemption linked to the RTLB transformation in 2011. This was based on agreement that RTLB with historical exemptions from RTLB training who moved across from their RTLB positions in the new transformed service at the beginning of 2012 may continue to be exempt from training so long as they remain in the cluster they moved to during the transformation. Should these RTLB win a new position in another RTLB cluster, they will be required to complete the mandated training programme.

### **Full exemptions**

Prior skills, knowledge and study are not a ground for a full exemption. This is because the training course is a practical programme specifically designed for the RTLB career. Massey University has confirmed that other qualifications that they and other Aotearoa universities offer would not be a substitute for the training. Full exemptions may be considered due to personal circumstances such as ill health, or in the case of impending retirement.

### **Partial exemptions**

Prior experience is not a ground for a partial exemption, but a partial exemption may be considered when an RTLB has already gained postgraduate qualifications in areas relevant to learning support. Massey University advice informs the decision. A partial exemption may be supported for an RTLB who has completed the Massey PGDip in Specialist Teaching with a different endorsement. They would need to complete the two Learning and Behaviour endorsement specific papers, which are typically completed in one year.

### **Applications for an exemption from study**

Applications should be addressed to the Secretary of Education and emailed to [RTLB.enquiries@education.govt.nz](mailto:RTLB.enquiries@education.govt.nz).

This should include:

1. the reasons for seeking an exemption and the type of exemption requested
2. confirmation of the relevant collective agreement or IEA
3. a supporting statement from the cluster manager
4. if the request is based on personal circumstances such as ill health, retirement or family commitments, include medical certificates and/or descriptions of the change of circumstances or an agreed retirement plan signed by the lead school principal.
5. if the request is based on prior learning, include a certified copy of relevant qualifications, university transcripts, and a description of each of the papers.

### **Deferring RTLB training**

RTLB must complete their training within four years of becoming an RTLB and can only defer their training for up to one year at a time, however, in exceptional circumstances applicants may be accepted for a longer deferment.

Requests are considered on a case-by-case basis. Email [RTLB.enquiries@education.govt.nz](mailto:RTLB.enquiries@education.govt.nz) outlining the reasons for seeking a deferral and include a supporting statement from the cluster manager.

## Induction

### Induction of lead school principals and cluster managers

Each year the Ministry supports the induction of new lead school principals and cluster managers by facilitating workshops focussed on the contents of this document. The Ministry also funds mentoring support from a more experienced lead school principal or cluster manager for the first year in the role.

### Induction of RTLB

On appointment, the cluster will allocate induction time for new RTLB. This process will take place within one or two months of the RTLB taking up the position and prior to the appointee taking sole responsibility for casework.

Induction includes familiarisation with the cluster needs analysis and strategic plan. The cluster's operational document will contain an induction section detailing the process.

### Roles

- The lead school/Kura board ensures an induction process is in place for appointees.
- The cluster manager is responsible for implementing the induction process.
- The cluster manager may determine that practical aspects of the induction, professional development and professional growth cycle conversations are undertaken by practice leaders.
- The responsibility for successful outcomes remains with the cluster manager.
- Practice leaders may also provide supervision, coaching and mentoring for new appointees.

### When the RTLB is new to the RTLB role:

- Introduction to the cluster team, lead school and/or host school.
- Introduction to the cluster schools/Kura, local Ministry Learning Support service manager(s), iwi and local social agencies.
- Information about the RTLB role and the principles under which it operates.
- RTLB policies and procedures, for example the practice sequence and record keeping requirements.
- Opportunity to co-work a case with an experienced RTLB during the induction period.
- Access to an academic mentor (a practice leader or an experienced RTLB), to support the appointee during training.
- Coaching and supervision.
- Information about Ngā Pouwhirinakitanga, Tautai and the NZRTLB network.

### When the RTLB is from another cluster:

- Introduction to the cluster team, lead school and/or host school.
- Introduction to the cluster schools/Kura, local Ministry learning support service manager(s), iwi and local social agencies.
- Provision of time to read, discuss and learn about the cluster policies, procedures and systems and the opportunity to share their experience of best practice from their previous cluster.

## Performance management

Performance management involves the development and implementation of policies and procedures to ensure that RTLB can provide services which effectively meet the needs of schools and students consistent with the goals and objectives in the cluster's annual and strategic plans.

The cluster manager ensures there is an appropriate performance management system in place including clear policies and procedures in relation to staff conduct and competency; a professional growth cycle that fulfils the statutory requirements for renewal of teacher practising certificates; support processes for RTLB including professional learning and development; and succession planning.

Aspects may be delegated to the practice leader(s).

**An effective performance management system should encompass many personnel management activities. These would include:**

- the recruitment and retention of staff
- the selection and appointment of staff
- those clauses of collective and individual employment contracts which relate to the performance management of staff
- the statutory requirements for renewing practising certificates
- the professional development and succession planning
- practitioner supervision
- performance supervision
- remuneration management
- the discipline of staff.

### Professional Growth Cycle

Lead school principals and cluster managers will facilitate a common understanding of the *Paerewa* or [Standards :: Teaching Council of Aotearoa](#) in the RTLB context and what meeting and using them in their practice looks like. They will also design with RTLB an annual cycle of professional growth, using the *Standards* or *Paerewa* to support teachers to engage in it.

Completing a Quality Practice Template (QPT) or similar document provides an assurance of what meeting the *Standards* or *Paerewa* looks like in practice.

Quality Practice Template			
Standard	Elaborations	What quality practices do you use in your setting?	What data or information do you use to analyse, or interpret teaching and learning?  What will learners, their whānau and families be saying?

Every RTLB will engage in professional learning using the *Standards* or *Paerewa* to advance their understanding of the relationship between their professional practice and outcomes for akonga (teachers and/or learners). Every RTLB will be given the opportunity to be observed, discuss and receive feedback on their practice (refer D, page 12).

Lead school principals and cluster managers will confirm annually that each RTLB has participated in the cycle and provide a statement to the teacher about whether they meet the *Standards* or *Paerewa*.

If in the lead school principal or cluster manager's judgement the teacher does not currently meet the *Standards or Paerewa*, they will discuss that with the RTLB and provide support to enable improvement.

If in the Principal or professional leader's judgment the teacher does not currently meet the Standards or Paerewa, they will discuss that with the teacher and provide support to enable improvement and if sufficient progress is not made, they may commence formal performance management processes outlined in employment agreements. Note that in these situations the Council's registration and certification policy will set out the expectations for the endorsement of a practising certificate renewal (refer F, p12)

### **Issues within the service**

Difficulties between RTLB, or between RTLB and other key stakeholders, are initially managed by a practice leader in a problem-solving manner. The cluster manager or principal/tumuaki may be involved if issues are unresolved.

### **Leaving the service**

The lead school/Kura principal/tumuaki has responsibility for managing the exit process when an RTLB, for whatever reason, leaves the service.

## **Professional learning and development**

Ongoing professional learning and development contributes to building and sustaining an effective service that improves learning outcomes for students.

The cluster manager is responsible for ensuring that each RTLB has a professional development plan that is reviewed annually as part of the professional growth cycle (refer C, page 12).

Professional learning and development focuses on RTLB practice and improved outcomes for students and is:

- planned and based on identified needs
- led by credible facilitators
- evidence-informed
- both formal and informal
- funded at cluster level through the RTLB administration grant
- linked to national curriculum initiatives and Ministry priorities

The process of identifying, planning, doing, recording, sharing and reviewing professional development is a cyclical one. The Teaching Council FAQ are helpful particularly the section on How much evidence do I need? Do I need a portfolio? <https://teachingcouncil.nz/faqs/faqs-professional-growth-cycle/>

## **Other resources**

### **Access to Microsoft products**

The current Microsoft agreements provide schools (including RTLB clusters) with software licences [Microsoft software for schools – Education in New Zealand](#).

### **Contracting IT support**

Should we add here

## **RTLb laptops**

RTLb teachers who meet the Ministry FTE requirement are eligible to access a laptop through the Tela+ Scheme.

- Leases are on a 3-year lease-to-return arrangement.
- Laptops are covered by the manufacturer's warranty for the duration of their lease.
- Subsidised laptops are covered under the Ministry's Indemnity Scheme for accidental damage, loss, and theft.
- There is a helpdesk and portal to support schools that use the scheme.

### **Key features of the Scheme**

- Leases are on a 3-year lease-to-return arrangement.
- Laptops are covered by the manufacturer's warranty for the duration of their lease.
- Subsidised laptops are covered under the Ministry's Indemnity Scheme for accidental damage, loss, and theft.
- There is a helpdesk and portal to support schools that use the scheme.

### **How to place an order**

Orders are placed through the TELA portal, <https://www.tela.co.nz>. This will take you to a login screen where you enter your email and password to log in.

To place an order, you need an administrator account. If you do not have access, please contact your host school who have the overriding authority to grant this permission.

If you have an account, it is recommended you use the functionality in your Asset Register adding 'RTLb - Teacher Name' to the assigned serial number. This will help differentiate between cluster/host school assets.

### **Key contact points**

- 0800 438 468 - TELA Helpdesk number (8:30am to 5:00pm)
- [support@tela.co.nz](mailto:support@tela.co.nz) - for email inquiries
- [www.tela.co.nz](http://www.tela.co.nz) - for the TELA portal and recent notices



## Appendix A: Role description of the lead school principal

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The lead school/Kura principal/tumuaki will have delegations, along with the cluster manager, for cluster management on behalf of the board. Together, the principal/tumuaki and the cluster manager form the RTLB strategic leadership and management team.

### Responsibilities

New lead school principals are encouraged to participate in Ministry-funded induction including mentoring support from experienced RTLB lead school principals.

The principal provides strategic leadership and management support for the cluster manager, particularly when there are employment, administrative, financial, relationship, and education sector or community issues.

The principal ensures that the cluster manager is managing the RTLB service on a day-to-day basis so that schools/Kura, teachers/kaiako and students in the cluster receive an equitable, quality RTLB service and RTLB are supported in their role.

### Personnel management

The principal is responsible for the induction, attestation process, performance supervision of the cluster manager.

In collaboration with the cluster manager the principal will ensure:

- the obligations of a good employer are met
- RTLB are suitably accommodated (housed)
- the development of a competent RTLB workforce
- all RTLB receive regular performance supervision and engage in a professional growth cycle
- ongoing monitoring of cultural competencies.

### Financial management

- Ensure the lead school has the financial systems to maintain RTLB financial records that support the RTLB service.
- Ensure RTLB funding is accounted for separately from the school's/ kura's funding.
- In collaboration with the cluster manager establish the cluster's annual budget.
- Approve and account to the board for expenditure against cluster targets.
- Ensure RTLB funding is included in the school's/ kura's annual financial statements.
- Ensure that distribution of RTLB learning support funding and/or resources is based on student or school need, not on a *pro-rata* basis.
- Ensure that there is a robust needs analysis process that informs the allocation of funds and resources.

### Planning and reporting

- In collaboration with the cluster manager and key stakeholders, develop the RTLB service strategic and annual plans.
- Support the cluster manager with the preparation of the annual report and financial report.
- Report regularly (at least quarterly) to the board on the activities of the RTLB service: issues and risks, service patterns, outputs and outcomes, staffing and expenditure.
- Ensure the cluster reports every 2 terms to cluster schools.

### Sector relationships

- Advocate for the RTLB service with cluster schools.
- Meet regularly with cluster school principals.
- Develop and maintain trusting and collaborative relationships with key stakeholders.



- Meet regularly with the local Ministry Manager Integrated Services or delegate and work to resolve any RTLB accommodation issues with the Ministry property Advisor.
- Where appropriate, include the cluster manager in meetings with community, sector and agency groups.
- Managing cluster complaints in line with cluster and school policy.

## Appendix B: Role description of the Cluster Manager

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### Appointment

The cluster manager is appointed by the lead school/Kura principal/tumuaki. The cluster manager must be a New Zealand registered teacher/kaiako with a current practising certificate. The position is a full-time role.

The cluster manager and the principal work together as a strategic leadership and management team for the RTLB service.

### Responsibilities

New cluster managers are encouraged to participate in Ministry-provided induction including mentoring support from experienced cluster managers.

The cluster manager has the following responsibilities:

#### Service planning and review

- Facilitate a robust service planning and review cycle incorporating self and peer reviews.
- On behalf of the board and in collaboration with the principal and key stakeholders, lead the development of, and prepare a three-to-five-year RTLB strategic plan and annual action plan that ensures the ongoing development and improvement of the RTLB service including service provision.

#### Financial and resource management

- Manage the day-to-day funding and resourcing obligations of the RTLB service.
- In collaboration with the principal, draft an annual budget for approval by the lead school/Kura board.
- Develop rigorous systems for needs-based allocation of RTLB LSF for students.
- Plan to manage cluster travel in cost effective ways and manage the reimbursement of RTLB travel.
- In collaboration with the lead school, maintain accurate financial records, and an RTLB asset register.
- Manage RTLB staffing so that the annual RTLB staffing entitlement is fully utilised but not exceeded.

#### Personnel management

- In collaboration with the principal, recruit and ensure RTLB staff are inducted into the role.
- Through the principal, advise the board on the allocation of RTLB leadership payments.
- Work closely with the practice leaders to ensure RTLB performance management tasks - including the provision of professional learning and development, performance supervision, performance management and professional growth cycles - are actioned.
- Ensure RTLB in training are supported, mentored, and supervised.

#### Systems, processes and policies

- Develop and maintain a cluster operational document, detailing cluster policies, procedures and systems.
- In collaboration with the regional Ministry Learning Support team, develop and maintain a seamless and simple request for support process and ensure it is understood and followed by RTLB and by all cluster schools/Kura.

### **Meeting cluster needs**

- Ensure there is an effective process to identify and analyse cluster needs.
- Ensure the RTLB team has the specialist knowledge and skills to meet identified cluster needs, for example, RTLB able to support Māori students and Pacific students, students in Māori-medium and Kura Kaupapa Māori learning settings, and students in secondary schools/wharekura.
- Manage the RTLB workforce so that RTLB are assigned to best meet student and school needs.

### **Data and reporting**

- Ensure processes are in place to check that all SchoolGate data is correct and up to date including correction of errors reported by the Ministry (where possible).
- Gather, collate, and report on RTLB outcomes data for all case types: individual students, groups of students, individual schools, and groups of schools/Kāhui Ako
- Prepare financial and service provision reports, at least quarterly, for presentation at the regular meetings of the lead school/Kura board.
- On behalf of the board and in collaboration with the principal prepare reports, twice yearly, for cluster school boards showing service patterns, service outputs and outcomes, allocation of learning support funds across cluster schools, and the level of RTLB staffing against the cluster's RTLB staffing entitlement.
- On behalf of the board and in collaboration with the principal prepare the RTLB annual report, financial report and quarterly reports for the Ministry according to the Ministry's reporting requirements detailed in Schedule D of the RTLB Funding Agreement.

### **Relationships**

- Develop and maintain a respectful and professional RTLB workforce including collaborative, open communication with the practice leaders and the RTLB team.
- Manage and support the practice leaders.
- Maintain respectful and trusting relationships with key cluster stakeholders including Kāhui Ako, local Ministry Learning Support, representatives from early childhood education, local iwi and Māori and Pacific whānau/parents and other relevant services and agencies.
- Develop and maintain strong networks across cluster schools/Kura and with other RTLB clusters.

## Appendix C: Role description of the practice leader

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A practice leader is an RTLB who has additional delegated leadership responsibilities within a cluster. As a practising RTLB, a practice leader must be a New Zealand fully-registered teacher/kaiako with a current practising certificate. As practice leader responsibilities attract one or more leadership payments of \$2,000, vacant positions should be advertised. Practice leaders maybe fixed term or permanent appointments.

### Responsibilities

A practice leader is responsible for leadership, guidance and support of RTLB in their professional practice, under the direction of the cluster manager. A practice leader supports the decisions of the RTLB strategic leadership and management team (principal and cluster manager). Practice leaders work closely with their cluster manager and support them in the day-to-day management of the cluster.

### Leading and supervising quality practice

- Ensure that RTLB practice is in accordance with He Pikorua and the RTLB Professional Practice toolkit. [He Pikorua in action – He Pikorua \(education.govt.nz\) http://rtlb.tki.org.nz/Professional-practice](http://rtlb.tki.org.nz/Professional-practice) .
- In collaboration with the cluster manager, ensure RTLB have the necessary resources to carry out their work.
- Support reflective practice processes in the team; develop and maintain communities of practice or project work that aligns with cluster strategic goals.
- Foster a commitment to evidence-based practice and service provision.
- Ensure that RTLB deliver a culturally appropriate and responsive service by supporting culturally competent practice through, for example, [Tātaiako](https://educationcouncil.org.nz/sites/default/files/Tataiako.pdf) <https://educationcouncil.org.nz/sites/default/files/Tataiako.pdf>.
- In collaboration with the cluster manager, ensure RTLB receive professional learning and development that supports RTLB goals and that aligns with the cluster strategic plan.
- Support the cluster manager in leading RTLB professional learning and development and professional growth cycle processes.
- Provide professional support to RTLB including mentoring and coaching as necessary.
- Provide performance supervision of RTLB.
- Facilitate induction for RTLB new to the team.
- Support RTLB in training to attain the RTLB qualification within the specified time and provide mentoring and/or supervision during the training period.
- Ensuring database case management requirements are met by RTLB.

### Reporting

- Support RTLB to provide data on service outputs and outcomes to meet Ministry reporting requirements.

### Professional relationships

- Support the lead school's governance and management policies.
- Provide open and reciprocal communication within the RTLB team and cluster schools.
- Develop and maintain effective, professional, and trusting relationships within the RTLB team.
- Ensure all RTLB provide consistent information on the RTLB service and the Ministry's Learning Support service to cluster Kāhui Ako, schools, communities, parents/whānau, and agencies.

## Appendix D: Role description of RTLB

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RTLB are appointed by the lead school/Kura principal/tumuaki. An RTLB must be a New Zealand fully-registered teacher/kaiako with a current practising certificate.

### Role

Based on He Pikorua and Te Tūāpapa the RTLB service, Te Mahau Learning Support and other services work with LSC and SENCOs, and school staff to provide seamless service provision and system improvements within the education system. RTLB have an essential role to play in building teacher capability to support outcomes for ākonga, teacher confidence and to improve home school partnerships.

The RTLB role, scope of practice, professional principles, practice sequence and service outcomes are detailed in He Pikorua and the [RTLB Professional Practice Toolkit](#).

### Responsibilities

RTLB are responsible for:

- providing the RTLB service to a cluster of schools in accordance with He Pikorua and the *RTLB Professional Practice Toolkit* meeting the service priorities and expectations listed in the *RTLB Funding Agreement*
- maintaining casework records according to cluster protocols
- maintaining trusting, professional relationships within cluster Kāhui Ako, schools and with parents/whānau, communities and community agencies.

### Qualifications

RTLB must hold the required RTLB qualification - the Post Graduate Diploma in Specialist Teaching endorsed in Learning and Behaviour issued by Massey/Canterbury universities, or one of the previous qualifications: the Post Graduate Diploma in Special Needs Resource Teaching (PG Dip SNRT); or the Post Graduate Certificate in Education Studies - both issued by the Auckland/Victoria/Waikato consortium of universities.

Unqualified RTLB appointees (including those who hold an historic exemption who move clusters) must attain the Post Graduate Diploma in Specialist Teaching endorsed in Learning and Behaviour within 48 months of appointment to their **first** RTLB position.

Prior to appointment clusters must check the RTLB holds the qualifications needed to enrol at Massey University to undertake the Postgraduate Diploma in Specialist Teaching endorsed in Learning and Behaviour.

### Professional organisations

Many RTLB choose to belong to professional organisations. The cost of individual membership is at the discretion of the cluster.

RTLB require cluster manager approval for leave of absence to attend professional organisation meetings and conferences.

## Appendix E: Example of a report to Board

Resource Teachers: Learning and Behaviour Report		
Summary items: <i>(Things the board are required to make a decision about....)</i>		
Things to note and matters from last meeting: <i>eg Underspend in RTLB LSF and plans to manage this</i>		
Area	Initiative:	Actions: (since last meeting)
Annual plan objectives and tasks	Report on progress	
RTLB Staffing	Staffing provided and how staffing use is tracking. PLD provided to RTLB	
Requests for support, service patterns and outcomes	Service patterns, outputs and outcomes supported by cluster data	
Learning Support Fund	Total fund, requests supported, how is the budget tracking?	
Any property and finance matters	Budget tracking Property or POD issues	
Risks and issues including any health and safety issues	Refer to any issues recorded on the risks, issues and celebrations log.  Suggest a twice yearly report on health and safety, including the well-being of RTLB.	
Looking forward - reporting and other events/milestones	Ministry reports and reports to cluster schools due dates	
Other matters	Issues of interest from cluster schools Feedback from cluster schools and Ministry Policy updates	