Annual Report

2022-2023

AEU
Australian Education Union
Tasmanian Branch


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Australian Education Union
Tasmanian Branch

Call: (03) 6234 9500
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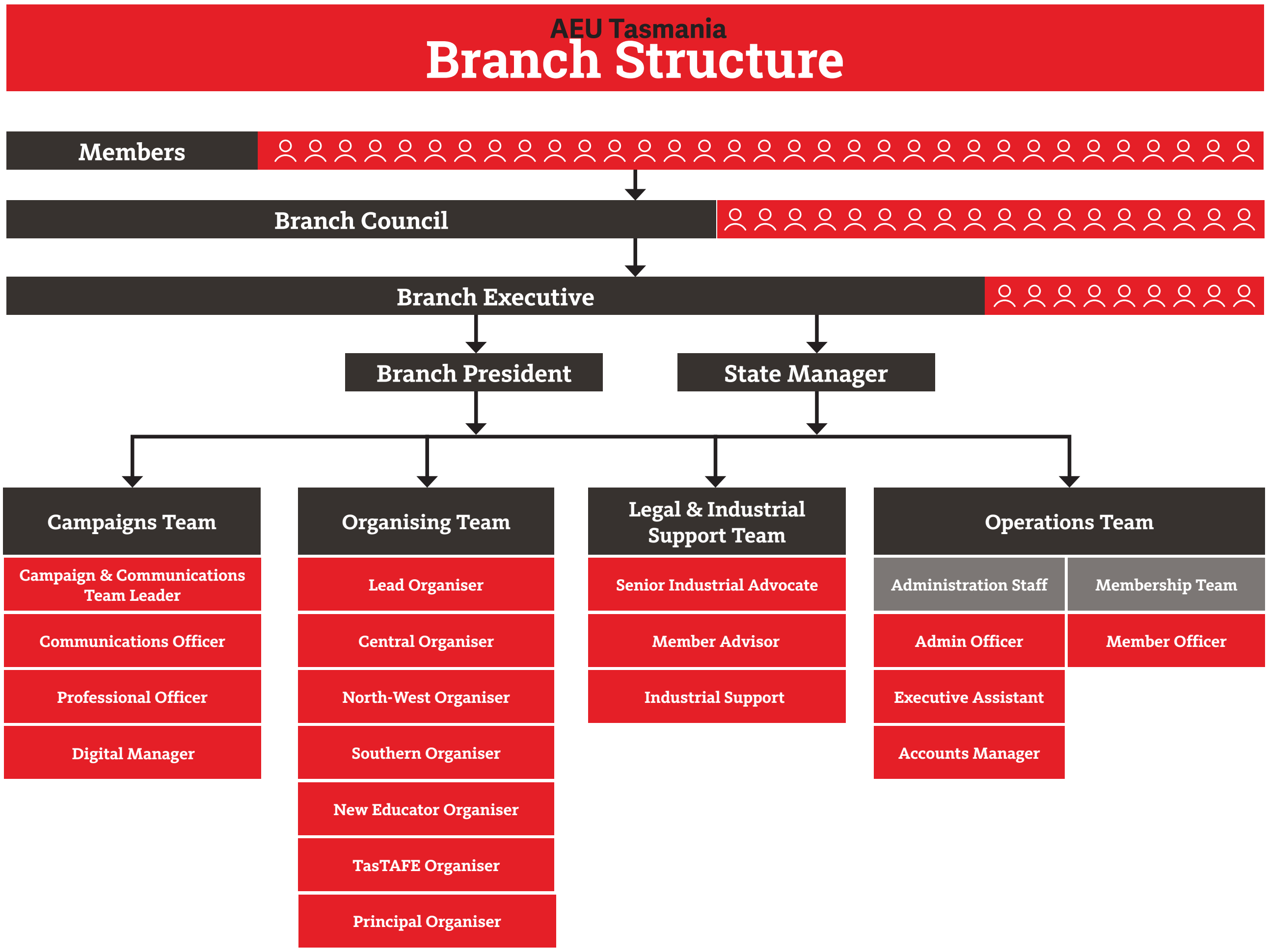
1.Branch Structure



2.State Manager's Report

Prepared by Brian Wightman

Introduction

It gives me great pleasure to present the Australian Education Union – Tasmanian Branch Annual (AEU) Report for the Financial Year 2022/2023 and provide an overview of the AEU's activities and achievements over the past twelve months.

Strategic Plan Implementation

Branch Executive and the Leadership Team regularly monitored the implementation of the Strategic Plan. Amendments were made to ensure that the plan was reflective of changes to the membership and the challenges that the profession faced including COVID and a massive shortage of teachers and support staff which, due to the ageing nature of the profession and the lack of foresight from successive governments, the union had predicted would occur over many years.

With varying levels of success, the Branch implemented Microsoft Teams to turn the goals of the Strategic Plan into actionable tasks. Further professional learning is required to guarantee that this program becomes embedded in our organisational culture.

Budget and Financial Position

The Financial Year 2022/2023 was a campaign period for the Branch with negotiating for PSUWA and the Teachers Agreement underpinning our work. To support efforts, we employed additional staff to ensure that we could advocate effectively on members' behalf. In planning for budget deficit, Branch Council carefully considered our secure financial position before committing to delving into our savings.

However, with budget discipline employed by the Accounts Manager, Team Leads and Branch Executive, we were able to turn that projected deficit into a surplus.

The Branch anticipated a deficit of $74,769 and, instead, returned a profit of $103,792.

We pushed the purchasing of cars, Reps Conference, and employed vacancy control including the State Manager filling the role of Principal Organiser into Financial Year 2023/2024. The Branch was also cautious with additional purchases including laptops and phones, but we will be required to spend on these items in the future to ensure that employees can perform their roles as efficiently as possible.

Furthermore, our investments across three accounts were again successful. In a fluctuating investment market, Branch Executive remained prudent ensuring a substantial return, which supported our efforts to turn a projected deficit budget into a surplus.

Due to staff absences, WLF Accounting & Advisory supported our finance processes and procedures during the financial year and, while this complicated operations at times, we thank them for their bookkeeping support during this time.

Branch Executive made some initial forays into developing a long-term financial strategy. This work will continue into the new financial year.

Industrial Coordination

The financial year began with continuation of bargaining for the Teachers Agreement, and the Principals Agreement, an industrial agreement that is nearly a decade old. We also formed bargaining teams for agreements that we would be a party to negotiating: the PSUWA and AHP Agreements.

Furthermore, the Branch continued bargaining with the ASU to deliver a new Employees Agreement for AEU staff.

By the end of the financial year, we had the Teachers Agreement, PSUWA, AHP, and the AEU Employees Agreement in place and we shifted focus to ensuring implementation was occurring in full.

The employees, bargaining teams, Branch Executive and Branch Council should be commended for their incredible work ethic during the financial year. To negotiate and finalise four agreements in one year was a terrific effort.

The Branch took early steps to prepare for TasTAFE bargaining for the General Staff and Teachers Agreements which now falls under the jurisdiction of the Fair Work Commission.

TasTAFE Executive, under the leadership of our Member Support Centre, had a major win in the Fair Work Commission ensuring that the carried over State Service instrument would remain in place for all employees until new Agreements can be finalised.

TasTAFE Executive remains rightly concerned that the move from the State Service will greatly diminish the rights, wages, and entitlements of our members.

As State Manger, following the conclusion of Peter Bird’s contract, I took on the role of Principal Organiser, which, with a new Agreement in the process of being negotiated, was a substantial and additional workload. As a result, Branch Executive made clear that every effort should be made to employ a part-time Principal Organiser for the start of the new financial year.

Office Spaces

Through prudent investment by Branch Executive and Council over many years, we are in a fortunate position to own our Patrick Street office in Hobart and our Best Street office in Devonport.

The North West and West Coast Office was updated with new blinds and a thorough clean and tidy-up. The ACTU and the ASU were supportive tenants during the financial year, sharing the space with AEU staff.

The Hobart office had a significant spend on improving and fixing the air conditioning system throughout the building to ensure that reticulation of air was compliant.

We welcomed new tenants, Kumon, to the office space downstairs in Patrick Street and we look forward to a long relationship with the after-hours tutoring provider.

The Northern Office made the big move from our long-term lease in Paterson Street around the corner and took up residence at 61 Cameron Street, Launceston. The “Stables” had provided adequate office space for many years, but new premises were required to cater for employees and the training needs of the Branch.

Professional Learning

The Strategic Plan remains clear in its objective to implement 'an inclusive, effective, responsive, and professional organisational culture'.

To that end, in the third quarter of 2022, the Branch made the decision to invest in the Leadership Team through attendance at a Leadership Masterclass facilitated by the Australian Trade Union Institute. The information presented and the knowledge garnered underpinned our work with employees during the financial year. For someone who has been fortunate to engage in significant professional learning during my professional career, the sessions were excellent, providing contemporary leadership strategies aimed at improving the culture of our workplace.

Employees participated in targeted professional learning throughout the year aimed at improving skills and knowledge to support their roles. The budget for professional learning was calculated at a rate of $1000 per employee. In Financial year 2023/204, we hope to increase the allowance to ensure we are strategic in meeting Branch goals.

Employees

The employees of the Tasmanian Branch deserves recognition and thanks for their incredible work on behalf of members during financial year 2022/2023. Their dedication to public schools and colleges, the profession and members remains exemplary. And while there are improvements and tweaks that can be made in service provision, it is impossible to fault the passion and dedication of our team.

Branch welcomed a new Southern Organiser, Miranda Debeljakovic on a full-time secondment from DECYP for a period of 12-months and TasTAFE Project Officer, Tristan Sabol on a 0.4FTE contract. They both added depth and highly relevant and recent experience to our team.

To guide the implementation of advocacy, services, and support, Workplans were initiated as a non-negotiable with clear goals, growth targets and requests for professional learning identified. There remains considerable work to complete in this space including formalisation of annual performance reviews and I look forward to working with the Consultative Committee to implement and model best practice.

Conclusion

As State Manager, it was a pleasure to work with Branch President, David Genford, Branch Executive and Branch Council. We formed a close working relationship and were able to bounce off each other as we navigated a significant number of meetings to pursue fair and reasonable industrial agreements.

David and I continued our bimonthly interactions with DECYP Secretary, Tim Bullard and Deputy Secretary, Kane Salter, discussing issues and resolving to fix individual, school, and system-wide concerns raised by members. Branch Standing Committees and Working Groups provided an additional layer of support in these deliberations, we acknowledge and thank those members for their service.

3. President's Report

Prepared by David Genford

AEU Tasmanian Branch President

When looking through my calendar to remind me of what has happened in the last 12 months, it was a shock to find things that I thought had happened a long time ago. It just shows just how busy this year has been.

Negotiations

It was a crazy six months when I saw just how many negotiation meetings the AEU were a part of. We had the Teachers agreement, the PSUWA & the Allied Health Professionals were we fought hard at the negotiation table for our members.

I was proud to be a part of our Union as we stood up to the government and let them know that there initial and subsequent suggestions of an offer were well below par. We saw schools schedule walk outs across the state, I was fortunate enough to be with schools such as Launceston College, Illawarra Primary, Punchbowl Primary and Hobart College whilst other schools also held actions at the same time across the state. We also saw schools come together at Montrose High School to do a joint action too. The government was able to see that as a Union we meant business and to see all schools close on two separate occasions was amazing. We also saw us stand our ground for In Class Support and it was only when the government finally put forward 40 hours of support per year of TA support, that we called off a third planned strike. Without the power of our members we would have not been able to get some great wins. I am also very proud of our PSUWA wins, as the feedback I'm often given is how great it was to see so many wins as previously it had been difficult to see benefits flow to our ESP members. We also saw an increase in the amount of Social Workers in schools and some extra benefits for our AHP members. I'd like to take this chance to thank Laura Russell, Lucie Cornelius and Lisa Hudson who as members put their hands up to be a part of the negotiation teams.

Implementation

The next steps for all our agreements is the implementation phase. The PSUWA deal that was struck in December has already seen some of the wins rolled out in schools, but it is crucial that we maintain a push for everything to be delivered ASAP.

For our teachers and AHP members the second half of 2024 will see implementation as a focus. We know for some of the bigger wins, there may be some teething issues, but we will be working hard to try and ensure all our members get the agreed benefits as soon as we can.

2022 Reps Conference

I wanted to ensure this report saw thanks thrown at our AEU team for their efforts to put together a Zoom only Reps Conference. It was a far from ideal situation and if COVID has taught us anything, face to face is a lot better then Zoom. Although we missed some of the normal social interaction between our reps, there was a lot of learning done and information processed especially around the Negotiations that were taking place. A lot of hard work behind the scenes saw a smooth conference take place but we are all looking forward to getting back to a brick and mortar conference during the next year!

Federally

From a federal perspective, we have already seen a government willing to actually listen to and even consult with Unions. I've been fortunate enough to meet with both Jason Clare (Education Minister) & Brendan O'Connor (TAFE Minister) who both speak positively about their portfolio and I hope that we will see them back up their talk with actions. With a government being more open to talk, it is also meant Canberra visits are more of a possibility which will also include conversations with cross bench and green politicians too. It has been a breath of fresh air to have the Blue Wall removed from Canberra that blocked all previous conversations.

2022/23 Focus

I would like touch on a few things that we had as part of our focus for the last year. Staff Shortages, the Principals Agreement and increasing our Media presence have been consciously part of our radar. We have been a strong advocate for the Minister and the Secretary to have strong and clear plans for the staff shortages that we have seen in most areas of our schools. It has been frustrating seeing other states put forward incentives and bonus' for staff whilst our state is ignored. Whilst some of the negotiation wins will be beneficial for our schools, it can not be relied upon to fix the situation we are in. The government has ignored our warnings for years that this would happen, this is their responsibility that they can't ignore. The negotiation of a Principals Agreement has been on the table for two years now and I would like to thank our AEU Principals Advisory Group that have been working hard in trying to find an agreement that will be supported by our members. It is crucial that we complete this in 2023 so that we can start on the promised AST/AP review which is long overdue. I would also like to thank our AEU staff for the work they have done in increasing our media presence. The general consensus has been to not turn any opportunities down (within reason) but I would like to think we have also been very proactive in telling our story. This has been especially crucial during our strike actions as we did a great job in keeping the community support onside.

DECYP Reviews – KPMG & Deloitte

We have taken part in two DECYP reviews, one by Deloitte into Teacher Workload and the second by KPMG on the Educational Adjustment Model. At this stage we await the reports but I have been pleased with the work our team has done in putting forward submissions and also to members who have consulted with the forums that were provided. Thank you to those that helped out.

The VOICE Campaign

The AEU are proud supporters of the Voice Campaign that is calling on Australians to vote Yes when the referendum is eventually called. We have seen training of AEU staff already rolled out helping explain what the campaign is about and how best to have conversations with people who are unsure of how to vote. We will roll out that education to our workplace reps and also to those members who are keen to learn and understand. We have committed to employing a project officer for the campaign and we also use our Reps Conference as a valuable tool to educate and plan.

As you can see, it has been another big year for the Union. Thank you to our members who have been strong supporters this year and a thank you to our staff who have done a great job in making it happen. I look forward to seeing what the next year will bring.

4. Finance Report

Prepared by Leesa Walker

AEU Senior Accounts Manager

The auditors

The auditors, WLF Accounting & Advisory, have signed off the audited accounts for the 2022/2023 financial year.

During this reporting period we anticipated a deficit of $74,769. Due to tight financial controls and investment interest, the AEU finished the year with a surplus of $103,792. The investment interest has recovered well from the previous 12 months, from the volatile market with the share portfolio.

More information is available in:

- Appendix 3 - Statement of Comprehensive Income.
- Appendix 4 - Statement of Financial Position.

Balance Sheet

The highlights as at 30 June 2023 were as follows:

- We have total equity of just over $6.25 million.
- There is $1,449,464 in general cash at bank reserves.
- The share portfolio investment stands at $1,125,708.
- Our combined mortgage fund investment is just over $1.97 million.
- Overall, the balance sheet shows that the AEU is in a strong financial position.

Staffing

Harriet Binet	Professional Officer	1.0
Nick Brown	Executive Assistant	1.0
Leeanne Clifford	Southern Organiser	0.8
Ruby Clifford (Resigned 21/6/23)	Membership Officer	1.0
Miranda Debeljakovic (Commenced 3/10/2022)	Southern Organiser	1.0
Gerard Enniss	North West & TAFE Organiser	0.6
David Genford	President	1.0
Carol Hayers (Resigned 28/9/2022)	Membership Officer	0.8
Rejani Johnson (Commenced 20/3/2023)	Membership Officer	1.0
Paul Kimbell	Digital Officer	1.0
James Kitto	Digital Organiser/Communications Officer	1.0
Bharti Kour	Member Advisory Officer	1.0
Janet Lambert	Lead Organiser	1.0
Kathryn Lee	Northern & ESP Organiser, Women's Officer	0.9
Rowan Richardson	New Educator Organiser	0.5
Michelle Rippon	Northern Organiser	1.0
Tristan Sabol (Commenced 18/8/22 to 22/12/22)	TAFE Deputy President	0.4
Jon Stanger	Campaigns & Communications Team Leader	1.0
Steven Smith	Senior Industrial Officer	1.0
Amanda Walker	Administration Officer	1.0
Leesa Walker	Accounts Manager	1.0
Mitch Wilkinson	Member Advisory Officer	1.0
Brian Wightman	State Manager	1.0

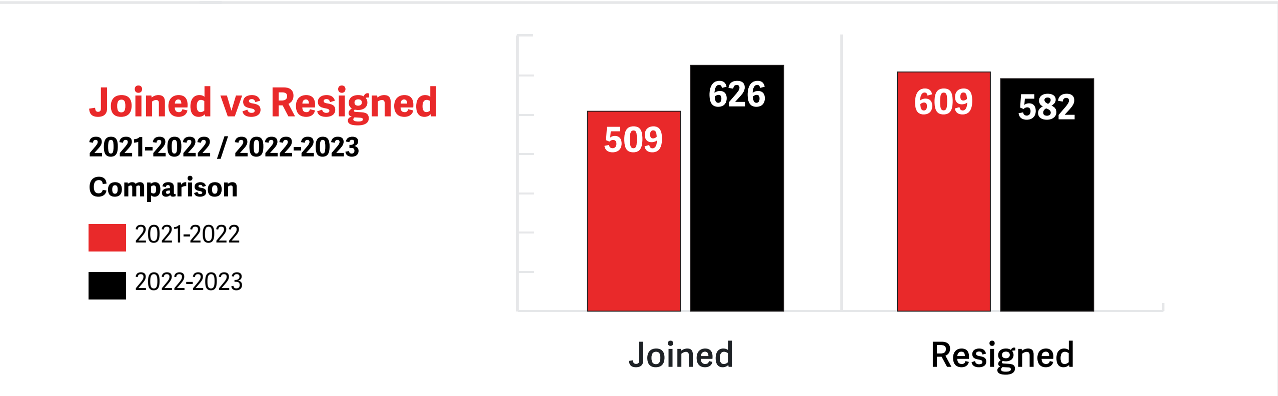
5. Membership Report

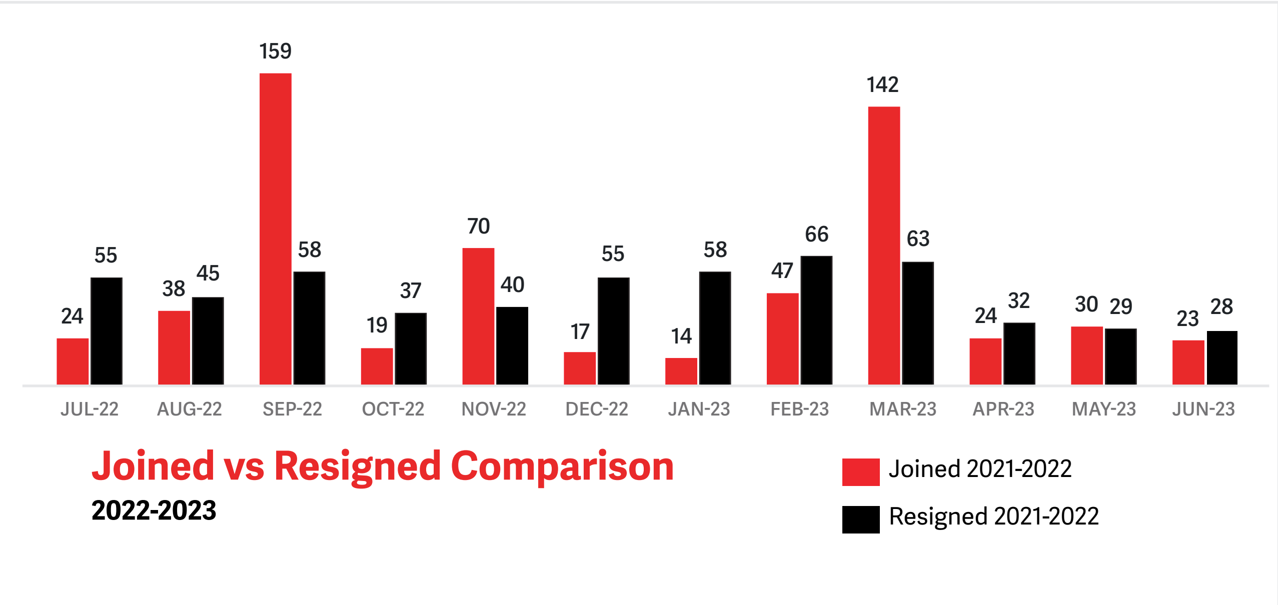
Prepared by Rejani Johnson

AEU Membership Officer

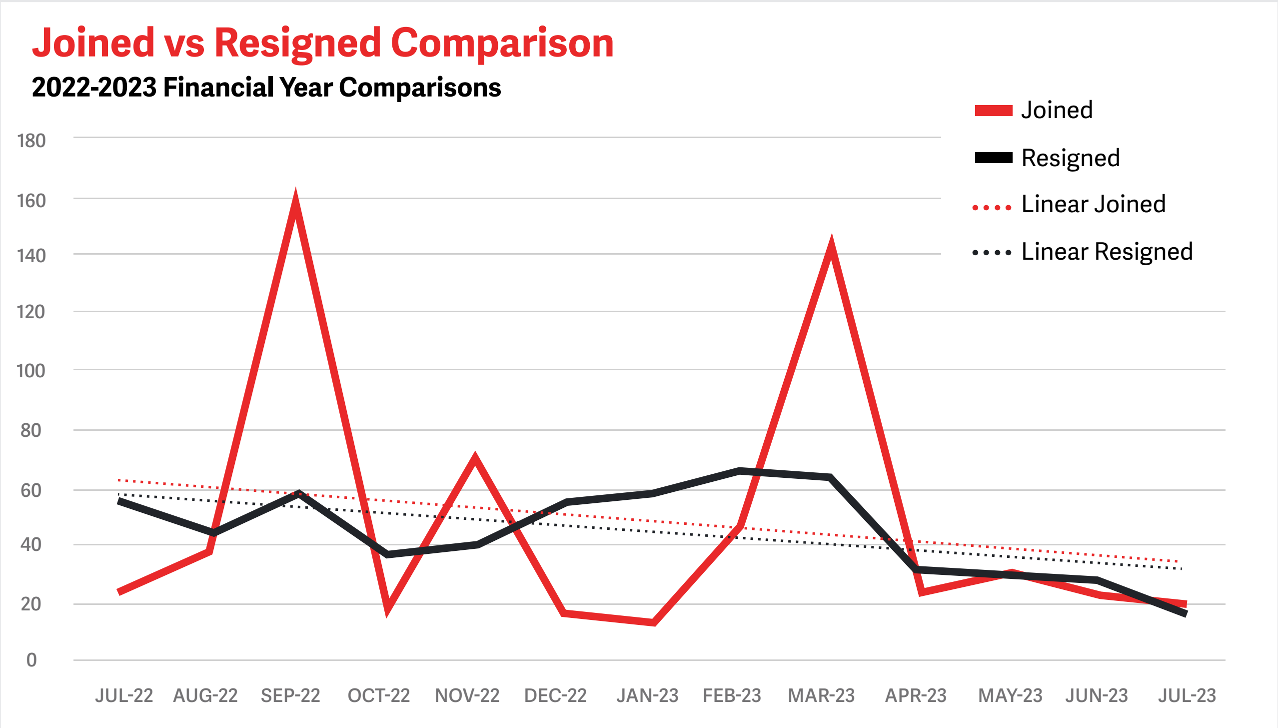
Membership Trends:

- The 2022/2023 financial year saw a NET increase to membership with a NET increase of 0.866%.
- Over 600 members joined for the period, and over 550 resigned during the same period.
- This is an improvement in membership growth compared to the previous financial year, however the difference is not that significant.

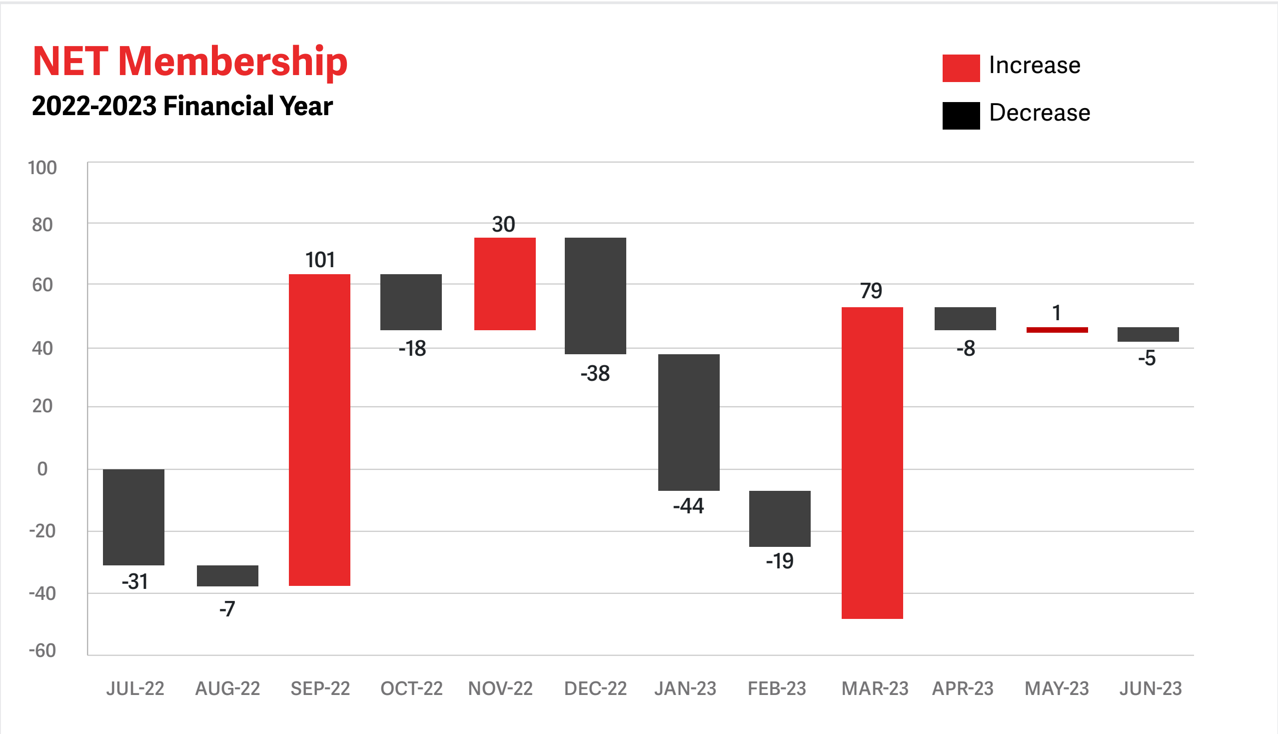




Membership fluctuations for the financial year can be seen in the below graph. Monthly membership cancellations occur at an increasing trendline except for 3 months. September and March member joins are partially because of campaigns. This membership trend is also apparent in the monthly NET membership graph beneath.



Monthly NET Membership:



Recruitment:

The same trend as last financial year followed where for every member cancelling due to retirement or resignation from DECYP, a New Educator in their first six years of teaching joined. During the 2022-23 financial year 124 members listed retirement as their reason for resignation and 161 New Educators joined the AEU.

Member Support- To reduce Cancellations.

A 3-month contribution suspension is offered to all members who are in financial difficulty. This suspension was first started during COVID-19 for members experiencing insecure employment or financial circumstances caused by COVID-19. Due to the effectiveness of the suspension in reducing cancellations, it is still offered to members facing financial hardship and allows them to maintain access to the support of the AEU.

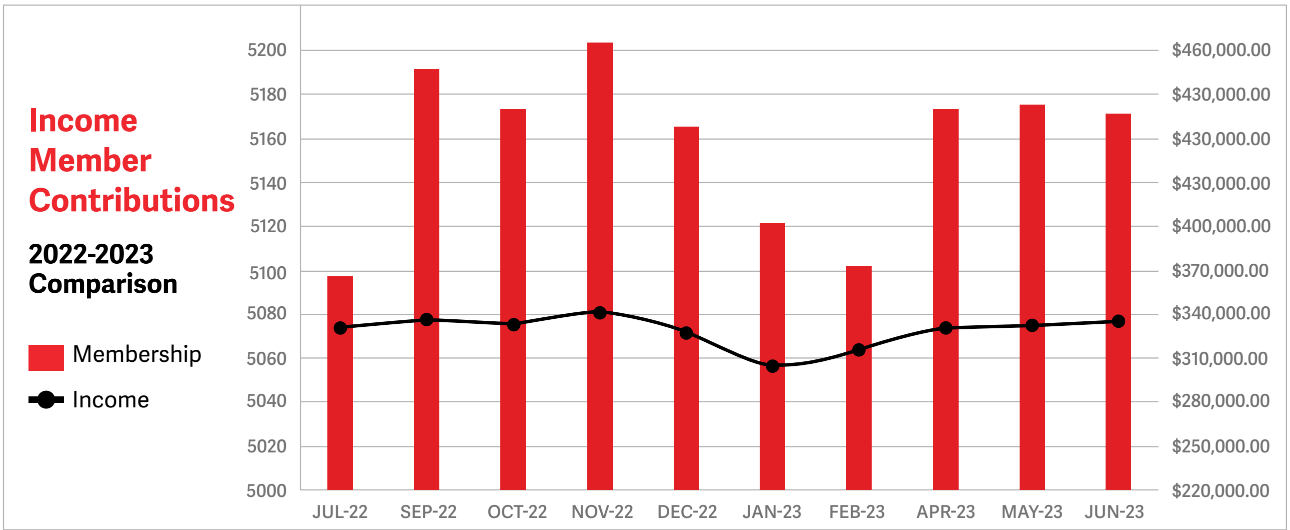
Flexible payment suspension options have assisted in retaining members and have been a valuable resource when supporting members in insecure financial circumstances.

TRB and WWVPC Reimbursements

45 Teacher Registration Reimbursements for New Educator members were processed during the 2022-23 financial year. During the same period 8 WWVPC Reimbursements were issued.

Income – Membership Contributions

Income from membership contributions didn't have many fluctuations. We received steady income throughout the financial year except during the stand down period. Salary/Award rate was updated in Sugar around June end to match the DECYP award rate which will help the future increase in membership income.



* Note that in months August and March there are 3 payroll runs as apposed to 2. These outliers have been removed in the above graph to show trends more accurately.

6. Appendices

6.1 Statement of Comprehensive Income

FOR THE PERIOD ENDED 30 JUNE 2023

	Notes	2023 $	2022 $
REVENUE	3		
Membership subscriptions		3,582,235	3,619,063
Board sitting fees			
Investment income and interest		177,123	59,778
Rental revenue		41,190	25,669
Other revenue		33,837	18,114
Capitation fees and other revenue from another eporting unit		-	-
Revenue from recovery of wages activity		-	-
Levies		-	-
TOTAL REVENUE		**3,834,385**	**3,722,624**
OTHER INCOME			
Grants and/or donations\		-	-
Net movement in managed investments		-	{44,213}
TOTAL OTHER INCOME		-	{44,213}
TOTAL INCOME		**3,834,385**	**3,678,411**
	Notes	2023 $	2022 $
EXPENSES			
Employee expenses	4(a)	2,608,484	2,465,479
Capitation fees and other expense to another reporting unit	4(b)	203,473	193,052
Affiliation fees	4(c)	87,746	95,531
Administration expenses	4(d)	579,386	532,850
Grants or donations	4(e)		6,500
Depreciation and amortisation	4(f)	189,092	195,531
Interest expense		775	782
Legal costs	4(g)	18,893	1,716
Net losses from sale of assets		984	
Other expenses	4(h)	41,658	54,831
TOTAL EXPENSES		**3,730,593**	**3,550,272**
SURPLUS FOR THE YEAR		**103,792**	**128,139**
OTHER COMPREHENSIVE INCOME		**-**	**-**
TOTAL COMPREHENSIVE INCOME FOR THE YEAR		**103,792**	**128,139**

6.2 Statement of Financial Position

As at 30 JUNE 2023

	Notes	2023 $	2022 $
ASSETS			
CURRENT ASSETS			
Cash and cash equivalents	5(a)	1,449,692	1,419,249
Trade and other receivables	5(b)	167,794	132,682
TOTAL CURRENT ASSETS		**1,617,486**	**1,551,931**
	Notes	2023 $	2022 $
NON-CURRENT ASSETS			
Land and buildings	6(a)	1,866,247	1,924,287
Plant and equipment	6(b)	81,306	83.136
Motor vehicles	6(c)	77,725	135,619
Intangibles	6(d)	65,697	81,513
Right-of-use assets	6(e)	118,404	18,687
Other non-current assets	6(f)	3,101,145	2,924,022
TOTAL NON-CURRENT ASSETS		**5,310,524**	**5,167,264**
TOTAL ASSETS		**6,928,010**	**6,719,195**
	Notes	2023 $	2022 $
LIABILITIES			
CURRENT LIABILITIES			
Trade payables	7(a)	94,597	73,622
Other payables	7(b)	94,625	111,604
Employee provisions	8	172,682	170,807
Lease liabilities	6(e)	37,053	19,410
TOTAL CURRENT LIABILITIES		**480,548**	**375,443**
	Notes	2023 $	2022 $
NON-CURRENT LIABILITIES			
Employee provisions	8	182,27	192,249
Other non-current liabilities	9	14,766	4,877
Lease liabilities	6(e)	81,591	-
TOTAL NON-CURRENT LIABILITIES		**197,044**	**197,126**
TOTAL LIABILITIES		**677,592**	**572,569**
NET ASSETS		**6,250,418**	**6,146,626**

Australian Education Union
Tasmanian Branch