



**Te Tāhuhu o  
te Mātauranga**  
Ministry of Education



NZSTA

**NZEI  
TE RIU ROA**

# Librarians and Library Assistants' Pay Equity Claim Settlement

## Work Matrix Guide for schools and kura

Use this to check employees have been translated to the right grade and to correctly grade new employees, or employees in a new role

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## In this guide

This guide is to help you understand and navigate the implementation of the Librarians and Library Assistants' Pay Equity Claim Settlement and how to use and interpret the work matrix.

The work matrix is primarily used to determine in which grade new employees should be placed when starting a new role or position. It can be used when an employee takes on a new role with different skills, demands and responsibilities, or to confirm that an employee has been placed in the right grade following automatic translation. It can also be used if the school or kura and employee agree regrading is required after the automatic translation has occurred.

## Key information

The key points below will be explored in depth throughout the guide.

- » The pay equity claim settlement covers librarians and library assistants, union and non-union members, in all state and state-integrated schools and kura, including specialist residential schools and Te Kura (the Correspondence School), except employees who opted out of the claim.
- » The relevant collective agreements are the *Support Staff in Schools' Collective Agreement* (SSSCA), *Specialist Residential Schools' Collective Agreement* (SRSCA) and *Te Aho o Te Kura Pounamu Specialist and Support Staff Collective Agreement* (Te Aho o Te Kura SSSCA). The work matrix is used across all three collective agreements and in any IEAs based off these collectives.
- » The work matrix is to be used from now on for all current employees covered by the pay equity claim settlement and all new librarians and library assistants, and applies to anyone whose work is described in the work matrix – regardless of their job title or designation.
- » The grade placement for a new role/employee should take into account the routine and ongoing skills, demands and responsibilities of the role, so that the grade recognises the highest-level skills, demands, and responsibilities required for competent performance of the role.



## The work matrix

A work matrix was developed to set out the skills, responsibilities and demands of librarian and library assistant roles. The work matrix has four grades (A-D) that determine the pay grade a librarian or library assistant employee is on. The audience for this guide is primarily principals, school boards, executive officers in secondary schools, school librarians and library assistants (covered employees and new employees), and their supervisors or managers.

The Librarians and Library Assistants' Work Matrix has four grades and sets out the most common skills, demands and responsibilities that apply to library staff roles.

Most librarians and library assistants are covered by the SSSCA negotiated by NZEI Te Riu Roa, or an IEA based on this collective agreement. The remainder of the workforce is covered by:

- » the SRSCA
- » the Te Aho o Te Kura SSSCA; or
- » an IEA based on one of these collective agreements.

The pay equity claim settlement applies to the covered librarians and library assistants on the SSSCA, Te Aho o Te Kura SSSCA and the SRSCA and those on IEAs based on these collectives. All covered employees will use the same work matrix.

For employees covered by the pay equity claim settlement, the Librarians and Library Assistants' Work Matrix replaces:

- » the Position Elements Table in the SSSCA (*clause 3.4*)
- » the Position Elements Table in the SRSCA (*clause 4.3*); and
- » the Position Characteristics Table in the Te Aho o Te Kura SSSCA (pages 7-9).

## The work of librarians and library assistants

The following is a descriptor of work for librarians and library assistants who are covered by this pay equity claim settlement. To be covered by the Librarians and Library Assistants' Work Matrix, an employee will:

*Maintain and/or procure and/or provide and/or grow a physical and/or digital collection of books, archives, learning resources/programmes, devices and library management systems.*

A full description of this work can be found in the Librarians and Library Assistants' Work Matrix Table from the [Settlement Agreement](#), which applies from **23 November 2022** and is set out below.

It is important that existing and new employees' work is assessed correctly and at the appropriate times. Please refer to the [How schools and kura use the work matrix](#) section in this guide for step-by-step guidance.



# Librarians and Library Assistants' Work Matrix Table

Work Matrix Grade	General description	Supervision and management	Level of necessary skills and knowledge	Problem solving	Interpersonal and communication skills
A	<ul style="list-style-type: none"> <li>» Holds responsibility for own work under general supervision.</li> </ul>	<ul style="list-style-type: none"> <li>» No formal supervision or mentoring of others is required.</li> <li>» Provides occasional advice or direction.</li> </ul>	<ul style="list-style-type: none"> <li>» Assists with cataloguing, issuing and receiving books, laptops and other resources.</li> <li>» Undertakes or assists with routine tasks including repairs, cleaning, weeding and processing books and stocktaking.</li> <li>» Uses relevant library management systems effectively.</li> <li>» Undertakes a range of general administration tasks, including setting up signage, displays and posters.</li> </ul>	<ul style="list-style-type: none"> <li>» Uses clear patterns and procedures to deal with clearly defined problems.</li> </ul>	<ul style="list-style-type: none"> <li>» Exchanges day-to-day information effectively, including questioning, providing information, and maintaining collaboration with colleagues, students and/or staff.</li> <li>» Responds with tact, patience and calmness to enquiries or challenges. Active listening, empathy and observation of physical cues are expected.</li> <li>» Respects and has basic knowledge of te reo Māori and tikanga or relevant other cultures.</li> <li>» Creates library signage and labels in languages other than English.</li> <li>» Contributes to the library being viewed as a safe and welcoming space.</li> </ul>
B	<ul style="list-style-type: none"> <li>» Manages own work and day-to-day priorities under limited supervision. Includes sole-charge librarians and archivists.</li> </ul>	<ul style="list-style-type: none"> <li>» Oversees or trains colleagues or student librarians.</li> <li>» Assists with the supervision of students in the library during break times, study classes, meetings and activities.</li> <li>» Plans and provides games and creative activities in order to engage students.</li> </ul>	<ul style="list-style-type: none"> <li>» Manages assigned collections and maintains relevant material and content. This includes administering relevant online research databases and digital learning resources, and creating and maintaining catalogue records.</li> <li>» Works with teachers to develop activities, workshops and events within the library and to support curriculum delivery.</li> </ul>	<ul style="list-style-type: none"> <li>» Works within existing policies and procedures, and identifies when issues need to be escalated.</li> <li>» Organises and determines the layout of the library and its facilities in a systematic way to make resources easier to</li> </ul>	<ul style="list-style-type: none"> <li>» Provides direct support to individual students and teachers requiring assistance with locating or researching material.</li> <li>» Provides immediate support and response to students who are upset or distressed, and escalates to other staff as required for further support.</li> <li>» Fosters a safe and welcoming environment in the library.</li> </ul>



B			<ul style="list-style-type: none"> <li>» Purchases and orders books, resources, capital assets and services for the library/archives within a financially delegated budget.</li> <li>» Applies for external funding and/or grants.</li> <li>» Manages, customises and updates the library management system to meet school needs.</li> <li>» Designs and hosts activities, workshops and clubs within the library.</li> <li>» Develops and delivers literacy-based presentations or sessions.</li> <li>» Promotes a reading culture within the school among staff and students.</li> <li>» Implements weeding and stocktaking procedures.</li> <li>» Conserves archives or taonga collections.</li> </ul>	<p>locate.</p> <ul style="list-style-type: none"> <li>» Works with students, whānau and teachers to ensure books and resources are returned and overdue items are recovered.</li> </ul>	<ul style="list-style-type: none"> <li>» Understands that students have emotional requirements and monitors them for escalating behaviours. Persuasion and negotiation skills are frequently required to assist de-escalation and encouragement of alternative behaviours.</li> <li>» Uses te reo Māori or another relevant language(s) in day-to-day interactions with students, whānau and staff.</li> <li>» Promotes inclusivity around gender/faith/culture/disability/sexuality when engaging with students. This level works with diverse learners in terms of learning ability and cultural diversity.</li> <li>» Arranges for guest speakers to come to the library to share knowledge and stories.</li> <li>» Builds and maintains relationships with parent groups, local communities, book and resource suppliers.</li> <li>» Conducts research on Te Tiriti o Waitangi principles, kaupapa Māori and local iwi, to enhance the library collection.</li> </ul>
C	<ul style="list-style-type: none"> <li>» Holds full responsibility for the management of the library and library staff with direct</li> </ul>	<ul style="list-style-type: none"> <li>» Manages the recruitment, development and appraisal of other library staff.</li> </ul>	<ul style="list-style-type: none"> <li>» Works with internal and external staff to identify and support future curriculum planning and changes, and undertakes research to ensure currency and</li> </ul>	<ul style="list-style-type: none"> <li>» Identifies and instigates system and policy changes to provide improved</li> </ul>	<ul style="list-style-type: none"> <li>» Models appropriate support for student wellbeing and is the escalation point for behaviour management in the library.</li> </ul>



<b>C</b>	<p>accountability for results.</p>	<ul style="list-style-type: none"> <li>» Authorises staff expenditure for the library and its facilities.</li> <li>» Develops and delivers a library budget for the school board/finance committee.</li> </ul>	<p>diversity of the library collection.</p> <ul style="list-style-type: none"> <li>» Designs and runs structured programmes to aid student learning.</li> <li>» Uses knowledge of Aotearoa/New Zealand schools and kura curricula to help students at all levels with research and literacy skills. This includes research for external exams such as NCEA and Cambridge, or specialist areas such as te reo Māori and in tikanga Māori.</li> <li>» Uses the school's foundational knowledge of te ao Māori to inform the design and layout of the library.</li> <li>» Responsible for annual planning and influencing medium-term strategic plans and decisions for the library through direct control or expert advice to senior leadership.</li> </ul>	<p>efficiency and effectiveness of library services.</p>	<ul style="list-style-type: none"> <li>» Initiates and creates library resources to support students in times of crisis. At this grade, the employee may play an active part in a group overseeing pastoral care at the school.</li> <li>» Responsible for leading the promotion of Māori literature and resources and ensuring accessibility.</li> </ul>
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CONTEXT: These roles in Grade D may be timebound (project-based) or ongoing. While they will have day-to-day library management responsibilities at Grade C, they require additional specialist knowledge to enable the provision of library services that meet the changing information and literacy needs of the school.

<b>D</b>	<ul style="list-style-type: none"> <li>» Positions at this grade are fully autonomous. Work requires subject-matter expertise based on extensive practical experience or a relevant tertiary level qualification, plus experience.</li> </ul>	<ul style="list-style-type: none"> <li>» Holds relevant professional knowledge, specialist skills or relevant qualifications/significant relevant experience to provide distinct expert services.</li> <li>» Manages the environment(s) with substantial independence, and reports to the school board.</li> <li>» Holds full accountability for major financial resources and responsibility for several significant physical/digital assets to provide services.</li> <li>» Responsible for strategic long-term planning and business development for the library, and its role and objectives within the school's overall business plans and objectives.</li> <li>» Strong, innovative and collaborative approaches are required to troubleshoot complex problems involving multiple variables and a range of options. Investigative research and analysis is necessary.</li> </ul>
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# How schools and kura use the work matrix

## How to use the Work Matrix Table for new or changed roles to determine grade

The work matrix replaces the Position Elements/Characteristics Table in the applicable collective agreements and all IEAs based on the collective agreements. The employment agreements of employees covered by the pay equity claim settlement are automatically varied to reflect this. The job description for the intended role needs to accurately reflect the responsibilities, skills and demands of that role.

When determining the grade for a new or changed role, the school or kura will need to:

- » assess the regular, routine and ongoing skills, demands and responsibilities of the role
- » ensure that the grade reflects the highest-level routine and ongoing skills, demands and responsibilities required for the overall competent performance of the role. Note: not every activity in a grade has to be part of the role for an employee to be placed in a particular grade
- » not include anything that is a one-off or isolated event.

**Note: It is important to remember that if an employee is expected to routinely do work at a certain grade on an ongoing basis, then they should be placed at that grade, even if most of their work sits in a lower grade.**

## Understanding the difference between grade and step

Grades and steps serve different purposes. Which grade an employee is placed in is based on the routine and ongoing work (skills, demands and responsibilities) undertaken by an employee as required for that particular role. It does not consider previous experience. The grade of the work should be determined prior to recruitment with an up-to-date and current job description for the role. Use the work matrix as a guide to define the roles and responsibilities of the role and determine the grade you are going to place the role into.

Note: Schools and kura should take the opportunity of a vacancy to reassess the requirements of an existing role, to identify whether the role has grown or requires changes to the job description before advertising the vacancy.

The step an employee is placed on within a grade takes into account relevant work experience (paid or unpaid), and the particular skills and qualifications of the person being employed as determined during the information-gathering stage of recruitment and in consultation with the new employee. If agreeing to a higher rate of pay, use the steps to achieve this noting the following:

- » Salary loading (SALLO) for an agreed higher pay rate can only occur at the top step of a grade. New SALLO cannot be added at any other step of a grade.





**Please see the [Translation Guide](#) for detailed information on SALLO, including case studies which demonstrate how SALLO works.**

An employee can be appointed at any step within the relevant grade of the Work Matrix Table. Please refer to the Librarians and Library Assistants' Pay Equity Claim Settlement to see what steps are available within each grade. When deciding where to place an employee, employers need to take into account the above points, as well as any that may be relevant to 'placement on appointment' in the respective collective agreements (the SSSCA, Te Aho o Te Kura SSSCA and the SRSCA).

### **Placing an employee with a break in employment (less than 12 months)**

If an employee was employed in a librarian or library assistant role under a collective agreement or IEA covered by the Librarians and Library Assistants' Pay Equity Claim Settlement, and any break in employment (including between schools or kura) has been less than 12 months, then placement on appointment must take into account:

- » their previous service
- » any relevant information provided by any previous school or kura
- » any relevant skills development and qualifications undertaken
- » previous relevant paid or unpaid work experience.

When the skills, demands and responsibilities of the new role are within the same work matrix grade as the previous role, the starting step should be at least the step last held.



## How to interpret the work matrix

The following case studies provide guidance on how to interpret each grade of the matrix when assessing the routine and ongoing skills, demands and responsibilities of a role's requirements as determined by the school and to show distinctions between each grade.

**Please note: the case studies are provided as examples only, as role requirements within schools will vary.** It is important to consider all responsibilities and skills in consultation with the employee.

Please refer to the work matrix, and if you require assistance with grading a role seek employment advice. It is important to remember that grade placement is based on the highest level of skill, demand and responsibility required for competent performance of the role. Not all tasks in a grade need to be undertaken for the role to be placed in a higher grade.

Please note:

- » in the case studies below some key descriptor words have been **bolded** to demonstrate the connection to the work matrix and the increasing levels of autonomy, responsibility and complexity you may see at each grade
- » although these examples refer to placing a new employee, the same process and considerations are followed when:
  - considering whether an employee's responsibilities have changed
  - checking that the grade of an employee is correct
  - confirming that an employee has been placed in the right grade following automatic translation; or
  - making regrading funding applications after automatic translation.

### How to interpret the grade matrix case studies

#### Case study 1

**Grade A:** School A has an opening in the library for a new library assistant. The school has reviewed and updated the job description based on the current requirements of the school. The library assistant will **work under the supervision** of a more senior librarian. The library assistant will have tasks including **shelving and issuing books** as well as processing returns. They will also assist the librarian with cataloguing new books and resources, **weeding and stocktaking**.

*These role requirements place the work in Grade A.*

#### Assigning a step within a grade

Diane was the successful candidate and due to her prior experience as a parent helper in the library, her school considered that placement on Step 2 of Grade A to recognise this prior experience was appropriate.



Note: If an employee has considerable experience in a similar role in previous employment, a school or kura might consider starting them on a higher step relevant to their qualifications and experience.

Examples of situations where the grade may change with the employee's agreement:

- » *If the role required the employee to purchase and order books, resources and services for the library from the library budget as an ongoing part of the role, they would be placed at Grade B.*
- » *If the role changed and now requires the design and hosting of activities, workshops, classes and clubs in the library as an ongoing part of the role, the role would be placed at Grade B.*
- » *If the role required the employee to work with students, whānau or teaching staff including, assisting with finding research material, organising activities to support curriculum delivery, or negotiating the return of overdue items as an ongoing part of the role, the role would be placed at Grade B.*

## Case study 2

**Grade B:** School B is hiring for a new **sole-charge** school librarian. The role will require the successful candidate to be responsible for a cohort of 30 student librarians who require training. The new librarian will need to **manage the library collection** within a financially delegated budget (with sign-off from the direct supervisor). The new librarian will be required to **develop** information literacy sessions for classes and will be expected to deliver these at the beginning of term. They will be required to ensure the library is safe and welcoming and look out for students who may need **additional support**. This might include reading to or playing a game with an upset or lonely student, **while escalating** matters up that require more expert input.

***These role requirements place the work in Grade B.***

### Assigning a step within a grade

Dan was the successful candidate, with prior experience as a librarian at a small primary school for three years. Dan's qualification and experience as a social worker were also taken into consideration and, as a result, he has been placed at Step 4 of Grade B.

Examples of situations where the grade may change with the employee's agreement:

- » *If the role required the employee to formally manage other library staff and sign off their expenditure for the library, the role would be placed at Grade C.*
- » *If the role required the employee to design and run structured programmes with sessions that build on the previous session over a period of time to aid student learning or the curriculum, the role would be placed at Grade C.*
- » *If the role required involvement in the broader support and nurturing of students' wellbeing, such as being involved on a pastoral care committee supporting the school's overall approach to student care, the role would be placed at Grade C.*



### Case study 3

**Grade C:** School C is hiring a library manager. The job description requires a person to **manage a large secondary school library** with two library staff members as **direct reports**. Issues in the library, such as student behaviour, will be escalated to the new library manager. They will be required to **develop and deliver an annual budget** proposal for capital assets and resources for the library. School C expects the library manager to **contribute** to the 1-3-year strategic plan. The library manager will **conduct research** and work with school staff and the external libraries to ensure the school library collection is diverse, current and supports the school's curriculum. They will **identify, develop and implement** library policies and protocols relevant to the library.

***These role requirements place the role at Grade C.***

#### Assigning a step within a grade

Ana has been promoted from librarian to library manager and placed on Step 1 of Grade C.

Context from matrix: roles that fit in Grade D may be timebound (project-based) or ongoing. While they will have day-to-day library management responsibilities at Grade C, they require additional specialist knowledge to enable the provision of library services that meet the changing information and literacy needs of the school.

### Case study 4

**Grade D – Example A (project-based):** School D is a large area school with two libraries catering for both primary and secondary students. School D requires the current library management system to be replaced to meet the demands of the two libraries and the growing nature of the physical and digital library collections. The role requires the successful candidate to manage the installation of the new library management system and the roll-out over the next two years, including ongoing training to staff members who will use the new system. This includes **full autonomy** over planning, decisions and reporting on progress to the school board. A high level of **specialist expertise** will be required for competent performance of the role.

***These role requirements place the work in Grade D.***

#### Assigning a step within a grade

Kaia was the successful candidate and has been employed by School D on a fixed-term agreement to plan and implement this project. She has a degree in library information management and experience in project management, which are levels of specialised technical expertise that the school and this project will require. Due to Kaia's qualifications and experience, she has been placed at Step 4 of Grade D.



## Case study 5

**Grade D – Example B (ongoing role):** School E is hiring someone who can provide proactive support to teachers to incorporate greater use of library resources into the curriculum. As a school with high-needs students, School E require a library manager who understands the students' requirements and has **specialist** behavioural knowledge combined with some pedagogical techniques, as these will be required when working directly with students. The role requires working **collaboratively** with teachers before **conducting investigative research** to ensure the school can provide the appropriate library resources.

***These role requirements place the work in Grade D.***

### Assigning a step within a grade

Julie was the successful candidate and has recently been employed by School E due to her experience working as a speech-language therapist and other relevant experience. Julie was placed on Step 2 of Grade D to recognise this.



## Who to contact for further advice

- » Ministry of Education – Ohumahi Support Team, email [ohumahi.support@education.govt.nz](mailto:ohumahi.support@education.govt.nz)  
log an enquiry on your Taku portal at [education.govt.nz/taku](https://education.govt.nz/taku) or call **0800 114 117**
- » NZSTA (for schools and kura), email [eradvice@nzsta.org.nz](mailto:eradvice@nzsta.org.nz) or call **0800 782 435** (option #2)
- » NZEI Te Riu Roa (for NZEI members), email [nzei@nzei.org.nz](mailto:nzei@nzei.org.nz) or call **0800 693 443**
- » Citizens Advice Bureau, call **0800 367 222**
- » Employment advocate of your choice.



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