

Statement of Intent 2024–2028

Rārangī Utu ā-Mātauranga
EDUCATION PAYROLL



MAY 2024

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Education Payroll

Incorporated in 2014 under the Companies Act 1993, Education Payroll Limited is a Crown entity, as defined by the Crown Entities Act 2004, and is listed in Schedule 4A of the Public Finance Act 1989.

Statement of Intent

This document is submitted by the Board of Education Payroll Limited, which is accountable to Education Payroll's two shareholding ministers, the Minister of Finance and the Minister of Education, as set out in the Crown Entities Act 2004.

This *Statement of Intent 2024–2028* sets out the strategic intentions of Education Payroll Limited for the period 1 July 2024 to 30 June 2028, to meet its statutory requirements. This document should be read in conjunction with our annual Statement of Performance Expectations.

Published in May 2024

Education Payroll Limited

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1. CHAIR'S FOREWORD

This *Statement of Intent 2024–2028* sets out our strategic objectives over the next four years and incorporates both our short-term strategic priorities and our longer-term strategic intentions. This document has been written in the context of the *Letter of Expectations (2024)* of our shareholding ministers, and should also be read in conjunction with our *Statement of Performance Expectations 2024–2025*.

As a result of the now-completed Education Payroll Development Programme, we are at or near all of our operational performance targets. We will focus our performance improvement activity where we are able to address performance issues within existing funding.

Our strategic focus

Our strategic focus now turns towards future-proofing our core payroll technology system, which has been extensively customised over the years to manage the complexity of employment agreements. In the coming years, the core payroll technology system will reach the end of its service life. As the system ages, it will be more difficult, risky, and expensive to operate.

We are very conscious that our primary reason for existing is payroll delivery, which is why our most critical strategic objectives are to sustain the demanding fortnightly payroll cycle in perpetuity, and to continue to be the best available provider for payroll delivery to the education sector.

We have established a set of workstreams to ensure we achieve our strategic priorities and milestones in the planned timeframes. Our overall strategic approach is to invest in our critical infrastructure and staff, measure our strategic and operational performance, manage our financial sustainability, and respond to Government priorities.

Our short-term focus

In the shorter term, there are significant uncertainties, our Master Services Agreement (MSA) and Key Performance Indicators (KPIs) will be renegotiated with the Ministry of Education and the Future Schools and Kura Payroll initiative may influence our investment decisions. During this period, our focus will be on maintaining our workforce capability, payroll delivery, and financial stability within our existing funding, while we plan and prepare for future-proofing our core payroll platform.

Our medium-term focus

In the medium term, our focus will be on upgrading or replacing our core payroll platform and implementing the next round of employment agreement changes.



Naomi Ferguson QSO

Board Chair
Education Payroll Limited



Liz Maguire

Chair of Audit and Risk Committee
Education Payroll Limited

2. OUR COMPANY

Our purpose and role

Our purpose is to deliver an accurate, timely and secure payroll service to schools and kura.

Our purpose and role are more fully detailed in our company constitution. In summary, we:

- a) Work with the Ministry of Education (the Ministry) to provide a reliable and effective schools payroll service that implements Government policy, enables the Ministry to meet its payroll obligations, and maximises value to Shareholders.
- b) Function as responsible stewards of the systems, processes, data, information, technology, and controls that collectively underpin the schools payroll service.
- c) Comply with all relevant legislation regarding pay, calculations, information, and deductions.

Our value propositions

Although we serve a range of stakeholders, the schools, and in particular school administrators and principals, are our primary customers – we deliver payroll to school and kura employees on behalf of their boards of trustees.

What our customers value most

Our research shows that the top five things school payroll administrators value from us are:

1. **Our EdPay portal** – schools love being able to complete tasks online without using forms, and they like the EdPay portal's ease of use.
2. **Our people** – schools value the consistency of our advice and having their phone and email queries dealt with by knowledgeable people they know and trust.
3. **Our reports** – schools appreciate getting accurate reports from EdPay that help them complete their payroll instructions.
4. **Our guides** – schools value our regularly updated guides, videos, and website tours about how to complete their payroll tasks.
5. **Our clarity** – schools are confident they're completing their payroll tasks correctly, without needing follow-up calls.

The Ministry's main focus for Education Payroll is to ensure we deliver a robust and reliable payroll service to schools and kura. To ensure that the Ministry, schools, and kura can be confident that the payroll is operating effectively, the top five things the Ministry values are:

1. **Our payroll accuracy** – the Ministry recognises paying people correctly is the most critical part of our service.
2. **Our performance** – the Ministry needs us to achieve agreed KPIs in keeping with the MSA.
3. **Our payroll compliance** – the Ministry needs school payrolls to be fully compliant with the employment agreements and legislation.
4. **Our system security** – the Ministry needs our payroll system to achieve and maintain high levels of security.
5. **Our alignment** – it is important to the Ministry that we are well aligned to Ministry and Government objectives for education.

Our payroll services

We ensure teachers and support staff in New Zealand's State schools are paid the right amount on time, every fortnight. That's around 100,000 teachers and support staff in 2,500 schools, paid a total of \$6.5 billion each year.

How we support schools

Our school account team are experts in the payroll system, and provide phone and email support to schools to help them deal with the complexity of their payroll so people are paid 'right first time'.

Our payroll platform is maintained inhouse

Our core payroll platform has been extensively customised over more than a decade to meet the needs of the education sector, and will soon need to be upgraded or replaced with a newer system.

The EdPay online portal our software engineers have developed inhouse provides a high-quality modern front-end that has been designed with, and for, schools.

3. OUR STRATEGIC LANDSCAPE

Education sector payrolls – where do we fit in?

School boards of trustees are employers of their people. The Ministry manages the payrolls and employment agreement negotiations on behalf of schools, and in turn the Ministry outsources payroll delivery to Education Payroll.

Why the payrolls are complex

Education Payroll was established as a direct result of the complexity of school payrolls and the issues with the previous payroll system.

School payrolls have many unique requirements, including:

- Pay calculations are made using 365 days in the year, rather than weekly or fortnightly, which is standard with most payrolls.
- Leave, holiday pay, sick leave, and allowances all require customised ongoing calculations to ensure correct payments.
- Employees frequently hold multiple jobs, each with differing rates and requirements, and there are multiple funding sources that must be correctly allocated on each payslip.

Our payroll delivery is specifically designed to manage these and other unique requirements.

We make sure the system works

Historically, school payrolls have required education sector-specific system functionality that was well beyond the standard functionality offered by industry payroll platforms.

This means we needed to design, build, maintain, and support significant customisations in and around the core payroll platform to enable the education sector payrolls to be calculated, delivered, and reported correctly in accordance with the respective employment agreements and our MSA with the Ministry.

Our payroll experts play an important part in helping school administrators understand and work with this complexity, recognising that school employment agreements are complex, the system is legacy, and payroll is only one of many functions of a school administrator.

Key strategic influences

Our strategic intent needs to accommodate a number of key strategic influences:

1. **Constitution** – this defines our role and purpose as a payroll services provider in the education sector.
2. **Shareholding ministers** – we need to be responsive to the expectations of our shareholding ministers.
3. **Schools** – an essential part of our role is to keep payroll easy, so that payroll does not intrude and/or distract from schools' core focus on delivery of education.
4. **Unions** – any employment agreement conditions that are beyond standard industry platform capabilities add to the aggregate demand that we face for custom functionality.
5. **Master Services Agreement** – this defines the Ministry's requirements, expectations and performance measures related to our payroll services.
6. **Te Tiriti o Waitangi** – we are committed to honouring te Tiriti o Waitangi | the Treaty of Waitangi and giving expression and practical effect to all articles of te Tiriti | the Treaty with Māori.
7. **Third parties** – part of our payroll service is making payments to third parties, such as Accident Compensation Corporation, Inland Revenue, KiwiSaver and student loans.
8. **Payroll industry** – we need to bridge any gap between the industry's standard platform capabilities and the payroll requirements of the education sector, so industry directions and strategies are key strategic influences.

4. OUR STRATEGIC INTENTIONS

Our strategic imperatives

The pay must go through

Payroll delivery is a highly operational fortnightly cycle that demands timely and accurate delivery – “the pay must go through”. Any significant issue or delay has major consequences.

As the payroll service provider for the education sector, our #1 strategic objective is to sustain the demanding fortnightly payroll cycle in perpetuity.

We must be the best provider

We are conscious that our primary reason for existing is payroll delivery, which is why our #2 strategic objective is for Education Payroll to be, and continue to be, the best available provider for payroll delivery.

In practice, this means we need to:

- Be excellent at payroll delivery.
- Achieve our operational KPIs.
- Deliver value for money.
- Future-proof our technology.
- Deliver on our strategy.
- Meet or exceed the expectations of the Ministry and our Shareholders.

Key strategic choices

There are some strategically important choices we need to make in the short-medium term (the next 3–5 years), as set out below.

We are working with the Ministry to make each of these choices based on the merit of the options, while also taking care not to constrain our strategic options in the longer term.

Exploring a ‘vanilla core’

Our core payroll platform and its customisations are a key strategic asset that will eventually need to be upgraded or replaced with a newer system.

Our challenge is that the customisations that have been made to meet the needs of the education sector have been done within the core platform itself rather than outside it. As a result the core platform is no longer capable of being upgraded.

The pragmatic way forward is to first remove the customisations from within the core platform and place them outside the core platform, and then

upgrade or replace the core platform. We refer to this as creating a ‘vanilla core’. Options for how best to achieve that are still being explored.

The future of the payroll

Replacing the existing system with a more modern, efficient, and effective system, together with changes in the operating model, will be necessary to lower operating costs, drive greater efficiencies, and address risks that are likely to emerge as the current system ages.

While a technology upgrade or replacement will eventually be required, the current system has been stabilised and is not in imminent danger of irrecoverable failure.

The Ministry and Education Payroll are collaborating on a range of strategic initiatives and investments to ensure the payroll remains stable until investment decisions are made on the future solution for Schools and Kura Payroll.

Our strategic objectives

➤ **Payroll delivery**

To deliver an accurate, timely, and secure payroll service to schools, which is our primary reason for existing as a company.

➤ **Business performance**

To be, and continue to be, the best available option for payroll delivery to schools.

➤ **Customer confidence**

To ensure schools and kura are confident their people are being paid accurately and on time.

➤ **Workforce capability**

To build, sustain and maintain a workforce who can support the education sector-specific custom elements of our payroll delivery, both the technology and the school administrators.

➤ **Financial sustainability**

To live within our approved funding envelope throughout this strategic planning period.

➤ **Future-proof technology**

To future-proof our core payroll platform by maintaining it effectively, moving to a vanilla core, and then upgrading or replacing the core platform.

Our strategic priorities

Our strategic priorities reflect the most pressing challenges facing us in the short-medium term.

Apart from our core focus of ensuring the payroll is delivered correctly, we have the following strategic priorities:

1. **Customer confidence** – continue to resolve historic and new issues that compromise accuracy, timeliness, or customer experience.
2. **Payroll platform** – explore a range of ‘no regrets’ investment options and work with the Ministry to identify the best way forward.
3. **Business rules** – identify and catalogue standard payroll rules and services vs. education sector-specific custom rules and services to pave the way for a vanilla core payroll platform.
4. **Capability** – make sure we are match fit to maintain customer confidence and ready to deliver what’s coming down the pipeline.

5. ACHIEVING OUR STRATEGIC OBJECTIVES

Payroll delivery is a core operational activity for us, so it is tracked via our operational metrics and reported on via our Statement of Performance Expectations and our Annual Report. Historically, we have delivered on our operational metrics at or near the target levels.

Delivery of the strategic workstreams will be measured and reported on annually as part of our Statement of Performance Expectations, and reported on in our Annual Report.

Payroll delivery

OBJECTIVE: To deliver an accurate, timely, and secure payroll service to schools, which is our primary reason for existing as a company.

#	Payroll delivery strategic workstreams	24-25	25-26	26-27	27-28
PD1	Timely implementation of changes to employment agreements	➤	➤	➤	➤
PD2	Explore what kura need, and identify pragmatic and affordable opportunities	➤	➤	➤	

Business performance

OBJECTIVE: To be, and continue to be, the best available option for payroll delivery to schools.

#	Business performance strategic workstreams	24-25	25-26	26-27	27-28
BP1	Improve definition of KPIs with the Ministry	➤			
BP2	Benchmark our cost per payslip vs. other payroll providers (value for money)		➤		

Customer confidence

OBJECTIVE: To ensure schools and kura are confident their people are being paid accurately and on time.

We achieve this objective via our daily ways of working – delivering the pay accurately and on time and putting right any issues as they arise.

#	Customer confidence strategic workstreams	24-25	25-26	26-27	27-28
CC1	Surveys and findings, including quarterly surveys	➤	➤	➤	➤
CC2	Work with beta schools that help us test what works best and resolve issues			➤	

Workforce capability

OBJECTIVE: To build, sustain and maintain a workforce who can support the education sector-specific custom elements of our payroll delivery, both in terms of the technology and working with the school administrators.

#	Workforce capability strategic workstreams	24-25	25-26	26-27	27-28
WC1	Review capability to align organisation strategy, culture, and resources	➤			
WC2	Develop and implement Workforce Strategy (key to KPI achievement)	➤	➤	➤	
WC3	Develop and implement staff retention and succession plan	➤	➤	➤	

Financial sustainability

OBJECTIVE: To live within our approved funding envelope throughout this strategic planning period.

#	Financial sustainability strategic workstreams	24-25	25-26	26-27	27-28
FS1	Identify a programme of 'no regrets' investment that will sustain and de-risk our environments, so we are well placed to implement any changes agreed as part of the business case process	➤	➤		

Future-proof technology

OBJECTIVE: To future-proof our core payroll platform by moving to a vanilla core and then upgrading or replacing the core platform.

#	Future-proof technology strategic workstreams	24-25	25-26	26-27	27-28
FP1	Document high-level business requirements to understand which are 'generic payroll' and which are 'education sector specific'	➤			
FP2	Confirm that our understanding of requirements and associated business rules is complete and accurate	➤	➤		
FP3	Complete a prototype that tests our ability to build engines or extensions that hold customisation <i>outside</i> the core	➤			
FP4	Determine the optimum path to resolve the issue of custom code embedded in the core system, and then implement that path	➤	➤	➤	➤
FP5	Upgrade or replace the core payroll system				➤
FP6	Upgrade our ticketing system		➤		
FP7	Move to the cloud or upgrade our on-premises infrastructure			➤	
FP8	Deploy 2-factor authentication for our EdPay front end	➤	➤		

Our strategic timeline

End of Year – EoY		2024		2025		2026		2027		2028	
Start of Year – SoY		EoY	SoY	EoY	SoY	EoY	SoY	EoY	SoY	EoY	SoY
Payroll delivery	PD1	Collectives						Collectives			
	PD2					Kura needs					
Business performance	BP1	MSA / KPIs									
	BP2					Benchmarks					
	BP3	LoE delivery		LoE delivery		LoE delivery		LoE delivery			
Workforce capability	WC1	Alignment									
	WC2			Strategy							
	WC3	Retention									
Financial sustainability	FS1	'No regrets'									
Future-proof technology	FP1	Custom audit									
	FP2	Business rules									
	FP3	Prototype									
	FP4	Vanilla core			Vanilla core		Vanilla core		Vanilla core		
	FP5								Uplift core		
	FP6				Ticketing upg						
	FP7					Move > cloud					
	FP8				2-factor auth						

6. MANAGING OUR BUSINESS

Service delivery

Payroll delivery – it's all about people

Our customer service is the most critical part of our payroll delivery. It is based on:

- **People** – our people responsible for administering pay instructions and working with school administrators. Good team leadership is critical to ensure the people get the time and care needed to perform at a consistently high level.
- **Process** – the quality and accuracy of our manual inputs and good processes. We need our people to be vigilant about our processes and to stay up to date with any changes in our control environment. We do quality assurance checks multiple times a fortnight, making timely corrections if any issues are found.
- **Systems** – systems are resilient enough, and we are slowly but surely moving the needle towards automation.

Our ability to get the payroll right first time has a significant dependency on schools getting it right first time, so we apply substantial resources to provide expert help to school administrators.

Business continuity – in times of crisis

We have a Business Continuity Plan (BCP) that is reviewed annually, learning from experience. It is focused on continuing to deliver school payrolls as fully, accurately, and timely as possible in a crisis.

In recent years we have experienced major events in which our BCP was pressed into action under crisis conditions, and proved to work effectively.

Continuous improvement – looking to be better

We have mechanisms in place to identify process improvements across delivery teams and make incremental improvements throughout the year.

Our software development teams currently use the Scaled Agile Framework (SAFe), which includes specific methods for continuous improvement.

We also continuously work on improving our development resilience by reducing key person risk, cross-skilling staff, and improving our documentation and practices.

Workforce

Organisational health – strategies to improve

We are continuously focused on improving key aspects of our organisational health:

- **Capability and culture** – reviewing and aligning our strategy, capability, and culture.
- **Workforce health** – maintaining a stable, engaged, and collaborative workforce.
- **Critical expertise** – retaining and growing our frontline capability and the critical expertise we need for our enabling technologies.

Attracting and retaining talent – staying ahead of the game

Sustaining our workforce requires us to attract and retain talent. There is a finite talent pool to draw from so it is highly competitive.

We look for people with core specialist skills, and then train them in the specialised knowledge that is unique to our business.

Health, safety, and wellbeing – looking after our people

Our office premises and the nature of our work make us a low-risk health and safety environment.

Our Board provides health and safety direction and commentary and requires staff to regularly report all health and safety incidents, risks and mitigation actions, together with current metrics for sick leave, wellbeing, and overtime.

We assess risks and mitigations monthly, use our annual Kōrero Mai staff survey to assess social and emotional risks, and provide an indepth annual health and safety report to our Board.

We provide our staff and contractors with a full suite of health and safety policies, procedures, guidance, and support to enable them to manage each day confidently in a safe and healthy way.

Diversity and inclusiveness – where difference is celebrated

We value diversity and are committed to being an Equal Employment Opportunity employer. We provide an environment where employees feel valued and are respected. Difference is celebrated, and diversity is encouraged.

We expect our leaders to facilitate an inclusive workplace culture. To support them, we have policies, procedures, and guidelines to assist in recruiting, onboarding and developing staff.

Te ao Māori – to better serve kura

Kura kaupapa Māori (Māori-language immersion schools) are an important part of our customer base. We acknowledge that we need to lift our understanding of how we can serve kura better.

Specific initiatives to improve services for kura, while staying within our means include:

- Exploring what kura need, and identifying pragmatic and affordable opportunities for improving our service delivery to kura.
- Prioritising Te Reo capability when hiring frontline staff, to work towards a bilingual school account team.
- Developing Te Ao Māori capability, with our Board nurturing Māori talent.

Technology

Platforms – all critical for payroll delivery

We have some platforms that are critical to our payroll delivery and support:

- **Ascender** – this is our core payroll system.
- **EdPay** – this is the online front-end system that school administrators use for their payroll.
- **Ticketing system** – this is used by school administrators to interact with us.

We use a specialised inhouse team and third party support partners to manage these systems.

Resilience – maximising the system's life

We will increase our focus on maintenance and continuous improvement to maximise accuracy and longevity of the core payroll platform.

Modernisation – future proofing

Our primary focus is future-proofing our core payroll system and our ticketing system, both of which are now over 10 years old. A recent Ernst Young audit identified our ageing ticketing system as our #1 technology risk.

We are also considering options to move to the cloud in the medium term.

Cyber threats – keeping an eye on cybersecurity risks

The cybersecurity environment is growing more challenging, and the number and sophistication of attacks is increasing. This is a significant and persistent issue that we need to address with strong counter-measures.

We use the New Zealand Information Security Manual (NZISM) and the Technology Cybersecurity Framework (CSF) as the basis of our cybersecurity activities.

An external assessment is currently being done to confirm our cybersecurity effectiveness against the NZISM and CSF and to identify opportunities to strengthen our cybersecurity posture.

A five-year cybersecurity strategy is being developed with a related roadmap for achieving the objectives detailed in the strategy, with external support and supervision.

A number of preventive measures are in place across the business. Examples include:

- Appropriate cybersecurity policies are in place to inform our people and especially new starters.
- Regular checks are done on who has access to our key systems to ensure its appropriate.
- We regularly educate our people on phishing attack awareness via random test emails.

We also have in place several data governance measures based on standards and policies, to manage availability, usability, integrity, security, and acceptable use of the data in our systems.

Going forward, the rising cybersecurity threat landscape will require progressively more investment and effort for us to keep pace.

Our Chief Information Security Officer has responsibility for our cybersecurity strategy, performance, and improvement, supported by a team of security officers and multiple champions for privacy and security across business.

Financial sustainability

We operate under a MSA with the Ministry that currently ends in June 2027. Given the services we perform, and the time it will take to identify and transition to an alternative provider, our expectation is that the MSA will be reviewed and extended past the period covered by this Statement of Intent.

All our funding comes directly from the Ministry under the MSA. Our funding is made up of:

- **Core services** – \$32.150 million.
- **Payroll upgrade funding and maintenance** – \$3.850 million for the 2024–25 year.
- **Additional cyber investment** – \$0.350 million per year until 2027–28.

Our objective is to maintain a solid financial base and ensure we operate efficiently within this core funding. Key operational drivers are to:

1. Maintain current services to ensure we run the pay accurately and on time.
2. Maintain our key strategic software assets to minimise errors or down time and achieve long-term stability.
3. Implement Ministry-requested changes to employment agreements, remediation and compliance, and pay equity settlements.

Investment decisions need to be made based on our current funding, and considering the longer-term health of our balance sheet.

We will use our balance sheet to fund ‘no regrets’ investment in payroll upgrades, until our cash balance reaches the Board’s minimum threshold, or alternatively a government decision is made to invest in payroll system replacement.

Assuming there is no further funding available to upgrade the core platform, we need to ensure we’re making prudent decisions about our long-term future.

We’ll do this by ensuring our decision-making is sequenced appropriately so we have no redundant effort, and ensuring the spend and investment we do make is agnostic to the options we have for the future of our core platform.

Some of the initial ‘no regrets’ investment identified will be to work with the Ministry to clearly document specific school payroll requirements, and to record unique business rules. We will then assess how these align with the ‘out of the box’ functionality available using current and alternative core payroll systems.

Risk management

We identify and manage material risks across strategic, operational, financial, cybersecurity, privacy, and technology environments.

We regularly review and evaluate current and emerging risks, while ensuring the organisation is taking appropriate actions to mitigate these.

We have an enterprise-wide risk management framework, based on ISO 31000 standards. Our Audit and Risk Committee monitors key risks, and any issues raised via independent assurance.

Closing out the Education Payroll Development Programme

The bulk of the Programme’s high-value Work Packages were completed before the Programme’s closure in July 2020, when remaining work was transitioned into business-as-usual.

EdPay was the largest Work Package, accounting for 92% of the financial benefits and 33% of the non-financial benefits of the Programme.

We are working with the Ministry to explore options to finish the remaining Work Packages.

The Board and the Chief Executive will continue to keep shareholding ministers informed of work to maintain and improve the current system.

We will also work with the Ministry and the Treasury on a pathway for addressing legacy technology platform issues.

7. ASSESSING OUR PERFORMANCE

Summary of our performance to date

In our *Statement of Performance Expectations 2023–24*, we set out performance assessment measures and targets, and we have achieved most of those targets.

The most important targets are outlined below; the actuals are for 2023, the most recent full year:

Measure	Target 2023–24	Actual 2023–24
Payroll cost per employee paid	\$250	\$313
School administrator satisfaction	75%	78%
Payroll payments are calculated accurately	99.5%	98.6%
Cybersecurity incidents	Nil	Nil
Service website availability	97.5%	99.7%

The target for Payroll cost per employee paid was set some years ago as part of the now-closed Education Payroll Development Programme. This measure needs to be revisited with the Ministry to align the calculation method for both target and actual.

Payment accuracy is slightly below target. A key input to this measure is the extent to which payroll instructions from schools are right-first-time. At 84% this measure exceeded the 80% target and is improving, but it still leaves a considerable gap to get to over 99% payroll accuracy that our people work hard to close.

Schools have had a number of challenges in achieving the right-first-time target, particularly around onboarding and offboarding staff, and managing staff sick leave, relievers, and teacher shortages.

Significant weather events, strikes, implementing employment agreements, loss of experienced staff, and loss of the Education Payroll office building for more than six months due to flooding, historically affected our ability to focus on our core task of delivering the pay accurately and on time each fortnight.

Assessing our strategic performance

Our strategic objectives as set out in this *Statement of Intent 2024–2028* will be delivered via workstreams that are managed using our quarterly Programme Increment process.

We will assess our strategic performance by reporting against targets and milestones for these workstreams.

Strategic lead indicators – fortnightly tracking

Each Programme Increment has six fortnightly sprints that are tracked to provide early indications of any new risks or departures from the expected delivery path.

Strategic performance reporting – see our Annual Reports

Our Statement of Performance Expectations will provide more detail about our targets for delivery of the strategic workstreams each year. Our progress towards achieving our strategic objectives will be reported in our Annual Reports.

Assessing our operational performance

Our MSA with the Ministry includes a Performance Measurement Framework that provides the basis on which we assess our operational performance.

Operational lead indicators – daily monitoring

Calls and queries to our school account teams are our most immediate flag about any operational performance issues. We also monitor around 100 performance metrics on a daily basis to improve our awareness of longer-term trends and issues.

Operational and financial performance reporting – see our Annual Reports

Our Statement of Performance Expectations sets out our operational and financial KPIs. Our performance in achieving our operational and financial targets is reported in our Annual Reports.



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