



Reference: 20190505

26 August 2019

s9(2)(a)

Dear s9(2)(a)

Thank you for your Official Information Act request, received on 29 July 2019. You requested the following:

Please provide information you hold regarding policies or guidance that assist Private Secretaries to fulfill their roles and duties in Ministers' Offices.

One document is within the scope of your request – *What do we expect from our secondees?* This document is enclosed. I have decided to release this document in full.

Please note that this letter (with your personal details removed) and enclosed documents may be published on the Treasury website.

This reply addresses the information you requested. You have the right to ask the Ombudsman to investigate and review my decision.

Yours sincerely

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OIA 20190505

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What do we expect from our secondees?

Last updated April 2019

Treasury secondees to private secretary roles retain their substantive role within the Treasury (for e.g., as an analyst or senior analyst), and their performance is assessed against the Treasury Performance Framework as for other staff. This note provides supplementary detail on what is expected in Private Secretary roles.

The purpose of a Private Secretary role is to support an effective working relationship between the Treasury and the relevant Minister.

Navigating the political interface

Private Secretaries are public servants, but operate in close proximity to the Minister and political staff. A core element of performing the role well is navigating this interface between the public sector and the elected government. This requires Private Secretaries to exercise considerable judgement on a day-to-day basis, so hard and fast rules are difficult to establish. However, some guiding principles are provided below.

Private Secretaries are public servants

- They are expected to act in a politically neutral way, and in their official capacity they should avoid participating in the provision of political advice or in activities that are or could be perceived as party political.
- Their advice should remain impartial. However, public servants can and should take into account the political context the Minister is operating in when positioning advice, in order to help the government of the day to achieve its objectives.
- While their roles relate to portfolios that Treasury services, Private Secretaries also have an important role to play as public servants in generally supporting the Minister to do their job well. It is appropriate for Private Secretaries to work with others in the office to collectively help the Minister to achieve their overall priorities and fulfil their responsibilities as a Minister.
- They are expected to work in a constructive and helpful way with political staff, respecting the differences between the roles.

Private secretaries are Treasury representatives and staff

- Private Secretaries should seek to represent the Treasury's advice and other work accurately, and should not act in a way that could undermine confidence in the organisation.
- However, this does not mean they cannot provide a Minister with their view on an issue. Private Secretaries can often bring additional context to an issue by virtue of their position that can help a Minister with their decision-making.
- Representing the Treasury does not mean a Private Secretary always needs to advocate strongly the Treasury position on each issue. However, they are encouraged to help the Minister understand the basis for advice.
- Private Secretaries should be careful about speaking on behalf of the Treasury where it is not clear they have a mandate to do so, or sufficient expertise (for example where Treasury has not yet had an opportunity to provide advice). If in doubt, Private Secretaries should seek a view from the Treasury first.
- Private Secretaries will often be involved in the commissioning of work from the Treasury, which may have implications for resourcing decisions. The role of Private Secretaries is to

communicate the Minister's expectations effectively to Treasury management, whose role it is to determine how the Treasury can best respond.

Private Secretaries should seek to maintain the trust and confidence of the Minister

- Private Secretaries may receive information in the course of their role that is politically sensitive or provided in confidence. They are expected to treat this information in confidence, provided that doing so is not in conflict with the code of conduct for state servants (see below).
- Private Secretaries will sometimes act as the representative of the Minister (for example, representing the Minister's views to the Treasury, or in a meeting with other Ministers, or at a public engagement). Private Secretaries should seek to represent the Minister's views accurately and with appropriate context, but remain cognisant of the need to avoid being seen as a political advocate.

Private Secretaries should treat information held by the Treasury appropriately

- Private Secretaries will have access to information held by the Treasury that has not been prepared or approved for provision to the Minister or other audiences. In keeping with our general information security practices, they should avoid passing on information outside of the Treasury without the appropriate approval.

The standard Code of Conduct for the State Services applies to Private Secretary roles.
http://www.ssc.govt.nz/upload/downloadable_files/Code-of-conduct-StateServices.pdf

The table below provides further detail on how the competencies for Senior Analysts may apply in a Private Secretary role.

Analysts can also occupy Private Secretary roles. Their performance is assessed against the expectations for analysts. Promotion to Senior Analyst can be considered on the same basis as for other staff.

Competency	How this might be demonstrated in a Private Secretary role
Analysis	<ul style="list-style-type: none"> • Quickly identifies which issues require the Minister's attention. • Effectively communicates analysis of complex issues, translating complexity into advice that is clear, sharp, credible and pragmatic. • Leverages their position to develop a strategic understanding of the issues, the Government's position and Treasury's perspective, and uses this understanding to help Treasury meet the Minister's needs.
Intellectual Leadership	<ul style="list-style-type: none"> • Identifies gaps between the advice Ministers may need or be seeking, and what agencies are working on. Works effectively with the Treasury or others to fill them. Makes connections that Treasury staff may not be able to see. • Supports the Minister or others in the office to identify strategic priorities, and how best to progress these. • Helps Minister to think clearly about issues and understand the core judgements and trade-offs involved in decisions. • Draws connections between areas of work across the Treasury and across the Government. • Identifies issues, opportunities, gaps and risks and takes actions to help respond to them.
People Leadership	<ul style="list-style-type: none"> • Communicates effectively with Treasury staff to help them understand the context within which the Minister is operating, and how the Treasury can best engage with the Minister. • Supports Treasury's leadership to understand the needs of Ministers, their priorities, and what these may require from the Treasury, beyond day-to-day demands. • Commissions work from staff effectively, providing relevant context and clarity about expectations. • Adapts leadership style according to context. • Embodies the values of being collaborative and challenging in working with staff to improve the effectiveness of their advice.
Communication	<ul style="list-style-type: none"> • Positions the Treasury's views to the Minister in a way that accurately represents the Treasury and supports the Minister and the Treasury to understand each other. • Uses clear and concise verbal and written communication, even when explaining complex issues. • Listens actively, and is able to effectively explain others' perspectives. • Maintains composure and professional communication under pressure and in difficult situations. • Exercises good judgement in representing Treasury or the Minister's views in a respectful manner, challenging where appropriate.
Relationship management	<ul style="list-style-type: none"> • Helps build a relationship of trust and confidence between the Minister and the Treasury, and between Ministers' offices. • Cultivates effective working relationships with political staff and Treasury staff. • Exercises good judgement and discretion in handling sensitive information and issues, maintaining the confidence of the Treasury and the Minister, and testing difficult judgements with others where needed.
Work practice	<ul style="list-style-type: none"> • Runs efficient and reliable processes for information and task management. • Helps manage information flows to the Minister to support them to manage their workload and focus their time where it is most valuable.
Expertise	<ul style="list-style-type: none"> • Is able to understand and communicate Treasury advice across a range of domains, including economic, fiscal, commercial, regulatory and general policy advice.
Internal management	<ul style="list-style-type: none"> • Works with the Treasury to establish expectations for what needs to be delivered by when. • Helps Treasury staff to understand the role of secondees and how best to work with them.

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