

# Investment Management Realignment 2025

## Final Change Decisions

27 November 2025

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# Introduction from Brent Chalmers

Tēnā koutou,

I'd like to begin by thanking everyone who provided feedback on the Investment Management Realignment 2025 proposal. I acknowledge that this would have been an unsettling time, and I am grateful for the views, insights and ideas you have shared with us on the changes we proposed. I have read and considered every question and comment you have sent through.

In the change proposal, I noted that the branch has delivered a significant amount of work since the formation of the Regional Infrastructure Fund.

Many of you mentioned that structure change alone isn't enough. I agree with you. Structural change will clarify roles, capability and accountability for our functions. But we also need to look at how we work, the way that we do things, and how we connect across our teams and with other branches within RDCS and MBIE. In the change proposal I outlined some features of our operating model that I thought were important, and we have made a start on some of these. As we bed in our structure, I am keen to accelerate these aspects of our operating model.

This document outlines what happens next. I want to work at pace and constructively to provide certainty for everyone so, the expressions of interest (EOI) processes, and recruitment of roles, will start immediately. The new structure will take effect on 12 January 2026. This transition period gives time for recruitment and EOI processes to

complete, changes in reporting lines to take effect, and to work together as a branch leadership team and within and across our teams on our future ways of working.

It is natural that as we implement the changes, you may have questions or concerns. I encourage you to raise these with your people leader, as your first point of contact, and you can also talk with me. A list of teams and services available to support you is also included at the end of this document.

I look forward to working alongside you as we implement these changes.

Ngā mihi nui



Brent Chalmers  
General Manager, Investment Management

# Implementation and embedding change

Transition, implementation, and embedding are phases which happen after a final decision is made. These phases focus on the critical things we need to do to bring our new organisational structure and ways of working, to life.

## Understanding confirmed change to your position

You can see confirmed changes to your position by reading through this document and viewing the confirmed organisational chart. More detail about confirmed changes to individual positions and new positions is provided at the end of this document.

## How does this affect you?

If the change directly impacts your position, you will receive a letter confirming how you are impacted by the final decision and what the next steps are. If the final decision confirms minor changes to your substantive position, your People Leader will discuss the practical timing of these changes with you.

The Branch's confirmed change process is provided in Appendix 1. This includes the Expression of Interest (EOI) and selection process.

If you notice any inconsistencies in the organisational structure represented, please advise your people leader or email [RDCSchange@mbie.govt.nz](mailto:RDCSchange@mbie.govt.nz). These decisions have also been shared with the Public Service Association (PSA).

## Implementation approach

All Investment Directors, Commercial Leads, Senior Investment Analysts, and Investment Analysts will be encouraged to participate in the Expression of Interest (EOI) process to indicate their preferred portfolio team—North, Central, Southern, or National Programmes—by submitting an EOI form outlining their preferences in order. The Expression of Interest (EOI) process will start from Friday, 28<sup>th</sup> November 2025 and close 5pm Tuesday 9<sup>th</sup> December 2025.

We ask you to indicate your portfolio choices in order of preference and provide a brief explanation for each selection. This explanation should include relevant experience, motivation, and how the portfolio aligns with your development goals. There will also be an option to indicate if you are open to joining any portfolio team. All submitted information will be carefully considered when assigning portfolio teams. Team skill mix and development opportunities will also be considered.

Information on the EOI process will be published on the Investment Management Realignment 2025 SharePoint site.

The newly created position and any vacant positions will be advertised internally within the Branch and across MBIE from 1<sup>st</sup> December, as per our normal recruitment process. The finalised new position description will be available on the SharePoint site.

There are a number of confirmed job title and/or reporting line changes. These may take some time to be processed through our systems, so may not all be visible on the date of go-live, but they will take effect as soon as practicable.

## Implementation timeline

Activity	Indicative Timeframes
Final decision	Thursday 27 November
EOI and selection period	Friday 28 November – Tuesday 9 <sup>th</sup> December
Recruitment commences for new and vacant positions	Monday 1 <sup>st</sup> December
Go-live of new structure	Monday 12 January 2026

# Confirming our case for change

## The following challenges have influenced the proposal for change and the decision-making process

- Unclear lines of accountability, imbalance of resources and an unmanageable span of control.
- An unclear approach to portfolio management.
- Key person risks.
- A lack of robust and documented process governance.
- An inability to quickly grow when needed, at times we don't have the capacity required to deliver our work programme.
- A lack of clearly articulated development pathways.

## Based on these drivers, we have sought to make sure:

- Our structure supports scalability, balances resource and provides capacity for major/special projects and national programmes.
- There is role clarity so that it is clear where responsibility and accountability for outputs and outcomes sits.
- An orthodox portfolio management approach is implemented through the formation of regional teams and a national project team.
- The right capability and resources, with effort focused where it matters most—enabling access to experts, offering development pathways, and strengthening process governance through continuous improvement.

## We have applied the following design principles:

Our design principles are based on the '*Foundations for the Future*' principles, tailored further to meet our change objectives, with a view to:

**Group like functions/activities together** to enhance our organisational efficiency and agility.

**Enhance alignment and connection between our functions** to ensure that our structure enables collaborative, effective and efficient ways of working, recognising the interdependencies between functions.

**Focus capacity and capability towards core services** to ensure we deliver to a defined workplan that reflects government priorities, demonstrates responsible spending, and delivers value for money.

**Anticipate our future needs** to be prepared for new challenges and opportunities, ensuring that we maintain and continue to develop the critical skills and capability that MBIE needs to achieve its long-term objectives.

## The changes we are advancing are intended to achieve the following outcomes, so that the branch is structured and able to operate in a way that:

- Is fit for purpose for now and the foreseeable future
- Is aligned to our deliverables across each of our functions by directing capability at our business needs
- Means that our roles, processes and functions are well defined and easy to understand, so that our staff know where responsibility lies, can trust each other to deliver and experience ease in working across teams
- Enables us to operate effectively and efficiently, including by reducing duplication and managing span of control
- Helps external stakeholders understand our roles and know their key points of contact.

## The following changes were proposed

- A reduction in the number of positions that report directly to my role resulting in the four Investment Directors and Manager Investment Office positions continuing to be part of the leadership team.
- Each Investment Director will have staff responsibilities.
- Minor scope change for the Investment Directors to recognise the responsibility of a portfolio and the staff working within that portfolio.
- Minor scope change and a change in title for the Manager Corporate, Governance and Compliance to Manager Investment Office.
- A dotted line reporting relationship of the Principal Advisor from the Regions branch to me, as the role will be shared between our two branches.
- A change in reporting line for the Commercial Lead from reporting to the General Manager to an Investment Director.
- Minor scope change and a change in title for the Senior Regional Advisor to Senior Investment Advisor which reflects more accurately the responsibilities of that position.
- Change in reporting line for the Senior Investment Analyst from Manager Corporate, Governance and Compliance to an Investment Director, ensuring the role is integrated with other senior/analysts in a portfolio team.
- Disestablishment of one vacant Investment Analysis position.
- Disestablishing the following fixed term positions: Investment Director and Senior Investment Analyst.
- Establishment of a Senior Advisor Investment Operations and Risk, reporting to the Manager Investment Office.

- Change in reporting line for current consultants and contractors to the Investment Director, National Projects.
- Change in title for the two Investment Directors in fixed term positions to Risk Director.

### Other operating model features

A number of other features of our operating model were proposed to be embedded as part of the change process, noting that many of these are already partially implemented:

- Investment Branch Leadership Team (IBLT) consisting of me, my direct reports, and our business partners. (Chair: Brent)
- Portfolio Risk Committee (PRC) to consider and provide advice on portfolio risk and related matters (Chair: Brent)
- Pricing Committee to agree arms-length pricing for our lending deals Privacy of Natural
- Portfolio Delivery Working Group (PDWG) to consider pipeline throughput from origination to contracted status. Privacy of Natural Persons
- Team Development Working Group (TDWG) to produce a development framework and training programme for the branch. Privacy of Natural Persons
- Artificial Intelligence Working Group (AIWG) to explore how to leverage AI in our work Privacy of Natural Persons
- Process Owners will be assigned across the branch to own and evolve our processes.
- Practice Leads will be assigned across the branch to assist, coach and develop certain practices.
- SME's will be identified who have expertise in certain areas of specialty, such as a sector.

- AOG Kānoa Subpanels (owned by Investment Director – National Programmes) to manage relationships with a small number of AOG providers for consulting, legal and talent acquisition services.
- Investment Hub (owned by Investment Office) – a knowledge base for our governance structures, key policies and processes.
- Continual Improvement Process (owned by Investment Office) – a structured process for idea capture, triage and execution of continual improvement initiatives.

## Confirmed Changes

After careful consideration of the feedback received, the final decisions relating to the Investment Management Branch are as follows:

- The leadership team will comprise of the four Investment Directors and Manager Investment Office positions, which will continue to report to me.
- Each Investment Director will have staff responsibilities and manage a portfolio.
- A change in title for the Manager Corporate, Governance and Compliance to Manager Investment Office, and an update of the PD to reflect the minor scope change.
- A dotted line reporting relationship of the Principal Advisor from the Regions branch to me, as the role will be shared between our two branches.

- A change in reporting line for the Commercial Lead from reporting to the General Manager to an Investment Director.
- The Risk Director will have a dotted reporting line to the General Manager.
- Minor scope change and a change in title for the Senior Regional Advisor to Senior Investment Advisor which reflects more accurately the responsibilities of that position, and which the incumbent has been carrying out from the time they moved into the Branch.
- A change in reporting line for the Senior Investment Analyst from Manager Corporate, Governance and Compliance to an Investment Director, positioning the role alongside other senior/analysts in a portfolio team.
- Disestablish the one vacant Investment Analyst position.
- Disestablish the following fixed term positions, Investment Director and Senior Investment Analyst.
- Establish a Senior Advisor Investment Operations and Risk, reporting to the Manager Investment Office.
- A change in reporting line for current consultants and contractors to the Investment Director, National Projects. And for the two Investment Directors in fixed term positions a change in title to Risk Director.

The features of our operating model proposed above will be implemented or continued where already in progress.

# Feedback

I am grateful to everyone who engaged throughout this process. Your questions, insights and alternative proposals were carefully considered.

In total 10 submissions were received from individuals as well as groups of people. The following table summarises the feedback received:

Feedback themes		Response
<b>Overall direction</b>	<ul style="list-style-type: none"> <li>Acknowledgement from many of you that we needed to change and support for the intent of the change, with some of you saying that you could see the potential for the portfolio teams to work effectively.</li> <li>Why restructure now, as there is uncertainty of the future and new Funds?</li> </ul>	<ul style="list-style-type: none"> <li>Noted</li> <li>Free and frank opinions</li> </ul>
<b>Change processes - General</b>	<ul style="list-style-type: none"> <li>Questions about how P&amp;C policies and processes would apply to people in positions that were proposed to have minor changes such as a title change or minor scope change.</li> <li>Question seeking clarification on the reference to 'Foundations of the Future', in the Change Proposal.</li> <li>Concern was raised regarding the previous consultation process.</li> </ul>	<ul style="list-style-type: none"> <li>The change team met with people asking these questions to provide information and clarification. Information on the applicable change processes can be found in Appendix 1.</li> <li>Foundations for the Future principles were developed for the change process that occurred in 2024 and focused on MBIE's Senior Leadership team, and the functions and accountabilities managed across the business groups. These principles have been used for subsequent changes that have occurred this year.</li> <li>I acknowledge the previous process caused some distress in the team, however I would very much like us all to focus on building a positive future</li> </ul>

<p><b>Change processes – EOI process</b></p>	<ul style="list-style-type: none"> <li>• Questions received asking for the rationale of and clarification of the EOI process.</li> <li>• Question regarding the opportunities to express interest in higher level roles as part of the EOI process</li> </ul>	<ul style="list-style-type: none"> <li>• The EOI process will allow for team members to indicate their preference to work within a particular portfolio. This will be taken into consideration, along with skill/experience mix of each team and opportunities for development – there is no guarantee you will get your first (or second, or third) choice. However, decisions will be discussed with each person to provide the rationale of the placement. I see this as an opportunity for our team to build new relationships, develop skills and knowledge with new teams, and learn from new managers. The current location of an individual may be considered in the process, however there will be more of a focus on other factors such as experience, knowledge and development opportunities.</li> <li>• The EOI process is not an opportunity for a promotion. However, there will be senior roles advertised which provide an opportunity for our staff. I encourage our branch staff to apply for those roles.</li> </ul>
<p><b>Structure and Operating Model</b></p>	<ul style="list-style-type: none"> <li>• Appreciation of clarity regarding roles, with requests to provide more information on our operating model.</li> <li>• Suggestions regarding the Risk Director role and function: <ul style="list-style-type: none"> <li>○ Reporting line should be to senior management i.e. the General Manager and DCE RDCS and board level committees – CRHL – to ensure independence and authority. As there is a perception that the role has been demoted</li> <li>○ Risk function should be independent of the Investment teams</li> <li>○ Risk Director position should be in the Investment Management Office</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Noted, this document provides information on our functions and how they are undertaken within the Branch. It also sets out some key features of our proposed operating model and some of these are already underway. Over the next 6 months there will be opportunities to work with you to refine the operating model and ways of working.</li> <li>• The Risk Director role holds a very important voice in our team and the primary objective of this move is to provide better support for the Risk Director and mitigate key person risk through knowledge transfer.</li> <li>• Whilst independence is important, we do not have the resources (budget nor headcount) for an independent risk team and so this, unfortunately, means compromise.</li> <li>• Although the concept of the Risk Director having distance from the frontline by embedding in the proposed Investment Office has some merit, the skillsets required to support the Risk Director are related to commercial competencies.</li> </ul>

		<ul style="list-style-type: none"> <li>The likelihood of intra-team conflict or a lack of independence is low, as the National Office is unlikely to hold a significant portfolio, as deals will be transferred to the regions in the early stages of contract life.</li> </ul> <p><b>Decision:</b> Risk Director to report to the Investment Director National Programmes Portfolio. In addition, there will be a dotted line for this position to the GM, DCE and Chair CRHL for escalation purposes. The has been a finely balanced decision, and I acknowledge the trade-offs that have been made.</p>
<ul style="list-style-type: none"> <li>Comment and question regarding the case for change relating to more support for special projects - how does the 'Regional Projects' team compliment the proposed changes to Investment Mgmt. and how does the workload/work type differ? As there seems to be crossover and an unjustified duplication of resource supplanting synergies.</li> </ul>	<ul style="list-style-type: none"> <li>We are seeing an increased number of new funds and packages, major projects, and programmes that need cross-region (aka national) coordination, such as Gas Security, Geothermal and Flood Resilience packages. Each of these needs to be "shaped up", usually requiring external expertise, tested, and hopefully operationalised. Currently we do this "on the side" with our existing teams, often to the detriment of a BAU work, and we rarely get to operationalising these. Once these are operationalised, they will fall into the remit of the regional portfolios.</li> </ul>	
<ul style="list-style-type: none"> <li>Suggestion to change the Commercial Lead Title to Investment Manager.</li> </ul>	<ul style="list-style-type: none"> <li>I acknowledge the Investment Manager title is widely used and understood, however I also understand the current "Commercial Lead" title was widely consulted upon and agreed when it was implemented. As I only received one submission relating to the change in title we will continue with the Commercial Lead title.</li> </ul> <p><b>Decision:</b> Keep the title of Commercial Lead.</p>	
<ul style="list-style-type: none"> <li>Question regarding how permanent the placements are and if there's the planned opportunity to move between Teams over time</li> </ul>	<ul style="list-style-type: none"> <li>I don't intend to run a "postings" process where there are regular movements of people between teams. My hope is that teams will bed in, developing their own processes, working styles and knowledge of the regions and projects they are working in/on.</li> <li>However, different work may flow to different teams to balance out workloads; there will be ongoing continuous improvement initiatives to work on, and team movement may still occur on an exceptional basis.</li> </ul>	
<ul style="list-style-type: none"> <li>Comments regarding development: <ul style="list-style-type: none"> <li>the lack of proposed mechanisms for development within the proposal document</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Change is never just about org structure, and that is why I set out the "other operating model features" in the change proposal document, including the Team Development Working Group. Work is already underway through this group to produce an Investment Branch competency framework, so we have an approach to both team and individual structured development.</li> </ul>	

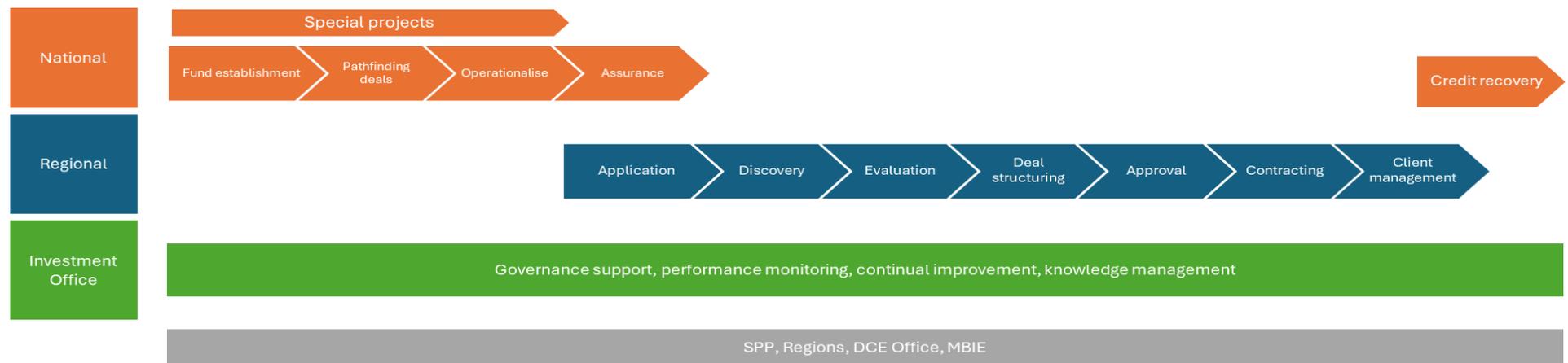
	<ul style="list-style-type: none"> <li>○ can't create the space for development through structure change alone given general resource constraints</li> </ul>	<ul style="list-style-type: none"> <li>• That said, we are all also responsible for our own development and, in the absence of a framework, I encourage you all to consider how you would like to develop.</li> <li>• Also, implicit in the structure, I believe, is a much clearer development pathway from IA to SIA to CL to ID to GM.</li> </ul>
	<ul style="list-style-type: none"> <li>• Questions regarding where the Personal/Non-financial DD will sit within the model? Will it be centralised or will it be within the regional groupings?</li> </ul>	<ul style="list-style-type: none"> <li>• The FDD and NFDD will be the responsibility of each team. However, as part of the transition, we will identify a "practice lead" within our branch to help define, evolve and coach FDD and NFDD to keep our practice consistent.</li> </ul>
	<ul style="list-style-type: none"> <li>• Question regarding the term <i>codified</i> – asking for a definition and what the rationale is for the role of codifying sitting all in one team.</li> </ul>	<ul style="list-style-type: none"> <li>• "Codified" means processes are documented, accessible, and easily followed.</li> </ul>
	<ul style="list-style-type: none"> <li>• Disagreement regarding the Continual Improvement Process being described as owned by the Investment Office, as the submission noted that we are all capable to offer improvements.</li> </ul>	<ul style="list-style-type: none"> <li>• Agreed, everyone will contribute to continual improvement. However, the process we follow for continual improvement (how to submit ideas, how they get shared, tested and scoped, how they get prioritised tracked and implemented) will be owned by the Investment Office.</li> </ul>
<p><b>Structure and Operating Model – National Programmes Portfolio Team</b></p>	<ul style="list-style-type: none"> <li>• Comments related to the National Programmes Portfolio team providing growth and learning opportunities.</li> <li>• Comment regarding how this portfolio will limit exposure to the funding programme process such as project development, scoping and assessment.</li> <li>• For one investment director the changes for their role will be more significant than the other three, in that they pick up the risk portfolio and they will no longer have investment responsibility for regions.</li> <li>• We received suggestions regard the composition of the National Programmes Portfolio team, for example it should consist of Investment Director (ID), a Commercial Lead (CL), and a Senior Investment Advisor (SIA) and include the two specialist consultants.</li> <li>• Question regarding how specialist contractors will be utilised, and we will transition from contractor reliance to internal expertise.</li> </ul>	<ul style="list-style-type: none"> <li>• The National workload is likely to be more varied in terms of new and different projects, credit risk and recovery, and operationalising new funds. However, it will be responsible for pathfinder deals that will provide some exposure to the funding programme process.</li> <li>• Although this will be a change in focus for the ID (National) the broad accountabilities of an Investment Director remain, including funds management, major/special projects and commercial risk management. This ID will have my full support in transitioning to the new portfolio.</li> <li>• I have carefully considered whether this portfolio should hold two SIA's or one CL and one SIA. On balance I feel the right mix to support the credit risk function and special projects is two SIA's.</li> <li>• One of the purposes of the National team will be to embed and operationalise funds as they arise. That means bringing in specialist contractors to help establish the fund, create pathfinding deals, transfer knowledge to the regional portfolio teams, provide assurance and then move on as we build confidence in our knowledge. This operationalisation/embedding process has not occurred to date</li> </ul>

	<ul style="list-style-type: none"> <li>• Question on whether permanent positions will be offered for these specialist roles</li> </ul>	<p>because there has been no systemic approach to how we will deal with new funds or initiatives – hence the National team.</p> <ul style="list-style-type: none"> <li>• These specialist contractors will not be taking up permanent roles – they will not be counted as part of our establishment which only reflects our employee numbers.</li> </ul>
<b>Capacity</b>	<ul style="list-style-type: none"> <li>• Questions relating to the lack of capacity during workload peaks and how that will be managed within a team.</li> <li>• Concern was raised regarding the absence of recruitment to address workloads</li> </ul>	<ul style="list-style-type: none"> <li>• As a first principle, each of my direct reports should manage priorities and workload within their own teams. Where this is not possible, it should be discussed at or between branch leadership and we may seek help from other teams who have capacity or consider other solutions such as outsourcing or reprioritisation.</li> <li>• I expect that all team members will input into their manager with respect to workload balancing. However, it will be the responsibility of managers and the GM to balance workload across portfolios.</li> <li>• I strongly believe that through clearer accountabilities, better knowledge and process management, better outsourcing, and continuous improvement we can create significant capacity.</li> <li>• We wanted to wait till this change process was completed before commencing recruitment for the vacant positions that we currently have. Once I have communicated the decisions associated with the change proposal we will start recruiting.</li> </ul>
<b>Transition</b>	<ul style="list-style-type: none"> <li>• Comments re reporting line changes disrupting established workflows without clear transition support.</li> <li>• Suggestion that team building should occur once the teams are set up and support provided to transition.</li> <li>• Suggestion that a communication plan be developed and implemented to ensure stakeholders know of new contact points and our roles.</li> </ul>	<ul style="list-style-type: none"> <li>• We will develop a transition plan, with input from staff, and implement the plan during the first 3 months.</li> <li>• The transition plan will include activities such as team building and building a cadence for team and individual meetings.</li> <li>• The transition plan will include the development and implementation of a communication plan.</li> </ul>

# Our purpose and functions

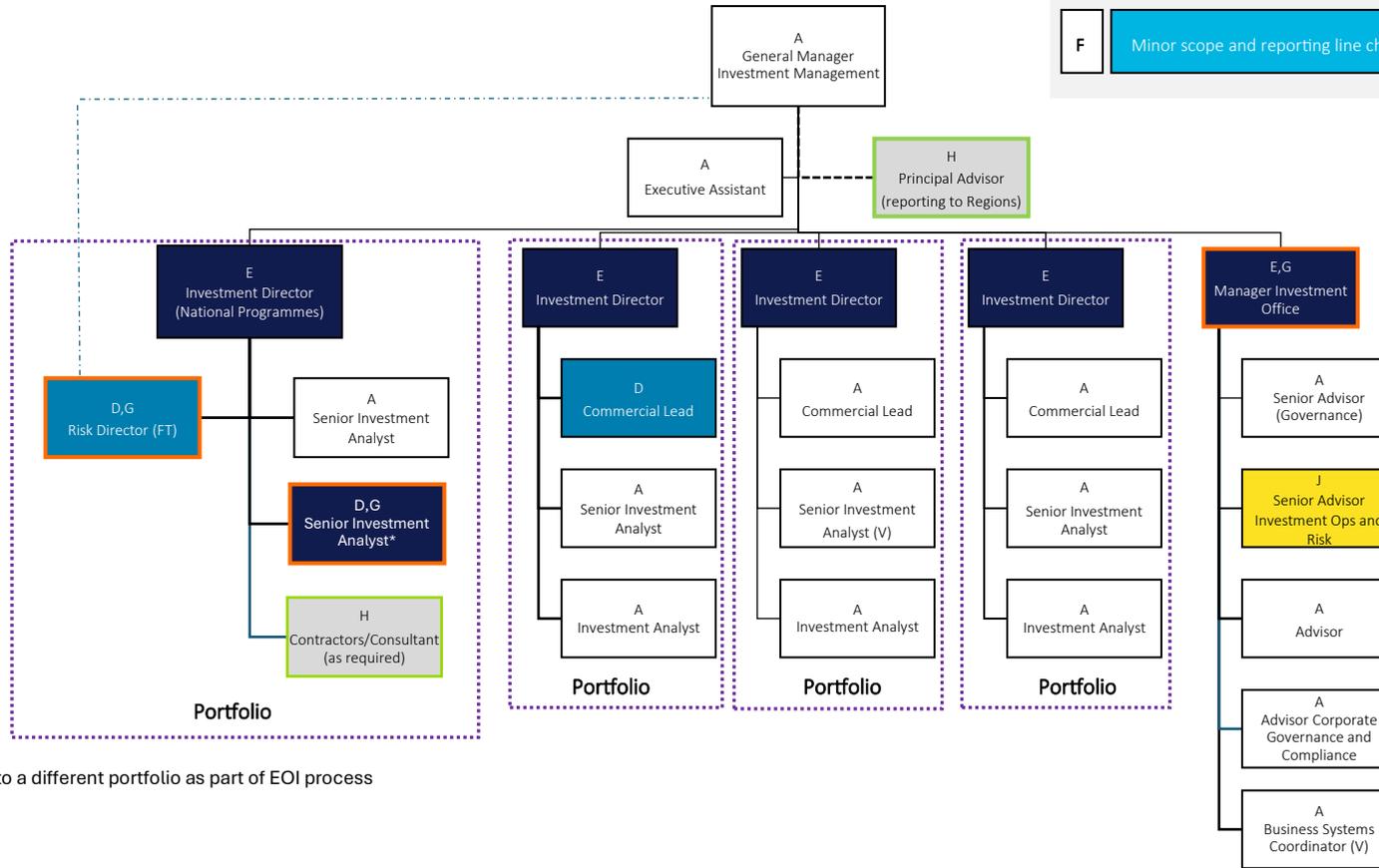
The Investment Team is responsible for identifying commercial projects, evaluating funding proposals, due diligence, making recommendations to decision-makers, designing and negotiating funding structures, executing contracts and ongoing monitoring of loan and equity investments.

Following your feedback regarding the need for more clarification and information on our operating model, the following diagram has been developed. It shows the range of activities that fall under the portfolio management and business support functions. One driver for change was that, under the existing branch structure, there is a lack of clarity around roles and accountabilities and inefficiencies. One design principle was to group like functions together to overcome these problems. I am confident this change addresses this, with the confirmed form following function. I acknowledge that form cannot address role clarity concerns on its own and I intend to have a strong focus on our ways of working over the coming months, as we embed the new structure.



# Confirmed organisational chart

A	No change	G	Position title change
B	Disestablished position	H	Not formally part of the structure or contractor positions
C	Change in reporting line and branch	I	Position title and branch/unit change
D	Reporting line change	J	New position
E	Minor scope change	K	Contestable reconfirmation
F	Minor scope and reporting line change	L	Contestable reassignment



\* May move to a different portfolio as part of EOI process

# Summary of changes

## Overall confirmed changes

Confirmed changes	
Number of permanent positions to be disestablished	1
Number of new permanent positions	1
Overall change in number of permanent positions	0
Number of positions with minor changes such as minor scope, reporting line etc.	10
Number of positions to take part in EOI process for Portfolio allocation	15

## New positions

New team	Position title	Reporting line	Status	Salary band
Investment Office	Senior Advisor Investment Opps and Risk	Manager, Investment Office	Permanent	V

## Disestablished positions

Position title	Reporting line	Unit/Team
Investment Analyst	Investment Director	Investment

## Reconfirmed with minor changes

Unit/Team	Position title	Description of change
Leadership Team	Investment Director (4)	Minor scope change
Leadership Team	Manager Corporate Governance and Compliance	Change in title to Manager Investment Office and minor scope change
Leadership Team	Investment Director Fixed Term (2)	Reporting line change from General Manager to Investment Director, National Programmes
Leadership Team	Commercial Lead	Reporting line change to an Investment Director and Portfolio
Investment	Senior Investment Analyst (1)	Reporting line change from Manager Corporate Governance and Compliance to an Investment Director and into a Portfolio team
Investment	Senior Regional Advisor	Change in title to Senior Investment Analyst and possible reporting line change to a different Investment Director and Portfolio

## Confirmed EOI process for Portfolio Allocation

Current Unit/Team	Current Position	Description of change
Investment	Investment Director (4)	Potential change to a different Portfolio
Investment	Commercial Lead (3)	Potential reporting line change to a different Investment Director and Portfolio
Investment	Senior Investment Analyst (5)	Potential reporting line change to a different Investment Director and Portfolio
Investment	Investment Analyst (3)	Potential reporting line change to a different Investment Director and Portfolio

## Appendix 1: Confirmed change process

Consistent with MBIE’s employment agreements and recruitment policy, the following information summarises the standard change processes which will apply to any changes confirmed as part of the final decisions. This includes reconfirmation, and EOI.

### Reconfirmation

This is where your substantive position is “reconfirmed” because your current substantive position remains substantially the same and you are the only person able to be reconfirmed to the role. Examples include - change in reporting line, title, a minor change in work content.

For reconfirmation to apply:

- The position description you are being reconfirmed into is the same (or substantially the same) as what you currently do, and
- Salary and other terms and conditions for the position are no less favourable, and
- Location of the position is in the same local area (note: this need not necessarily mean the same building and/or the same street).

If your substantive position has been reconfirmed as part of the final structure, you will not need to take any action as you will automatically be reconfirmed into the position.

### Expression of Interest Process (EOI)

All Investment Directors, Commercial Leads, Senior Investment Analysts, and Investment Analysts are required to participate in the Expression of Interest (EOI) process to indicate their preferred portfolio team—North, Central, Southern, or National Programmes—by submitting an EOI form outlining their preferences in order.

You are encouraged to indicate your top three portfolio choices and provide a brief explanation for each selection. This explanation should include relevant experience, motivation, and how the portfolio aligns with your development goals. There will also

be an option to indicate if you are open to joining any portfolio team. All submitted information will be carefully considered when assigning portfolio teams.

### New and vacant positions

All new and vacant positions will be internally advertised as per our normal recruitment processes.

## **Selection and Recruitment Timeline**

Timeframes will be designed to enable recruiting People Leaders (existing and new where applicable) to lead the shortlisting and selection processes for their teams.

Timelines for each phase of recruitment will be set out in advance and recruiting People Leaders will be expected to treat this as a priority. The purpose of this is to ensure that processes are coordinated where they need to be and completed in a timely way.

## **Recruitment for other existing MBIE vacancies**

If you wish to apply for any other existing MBIE vacancies (i.e. vacancies that are being advertised separately to the change processes), this can be done via the MBIE careers site at any stage of the process.

If you are considered an affected employee, this will need to be indicated as part of your application as first consideration will always be given to affected employees over other applicants subject to them meeting the suitability requirements of the position. Where applicable, a panel interview will be used as a contributing selection tool to assess the demonstrated skills, experience and qualifications against the key accountabilities and person specifications as outlined in the position description.

## **Review process**

If you disagree with the application of this process, including for example your reconfirmation or direct reassignment into a position as part of the final structure, you have the right of review. This process is set out in your employment agreement. You

are encouraged to raise any concerns with your People Leader at the earliest opportunity so these can be worked through with you on a case-by-case basis.

## **Secondments and acting arrangements**

If you are currently on secondment or acting in a different position, there may be decisions confirmed for that position as well as your permanent substantive position. However, you will only be considered an affected employee if your permanent substantive position is significantly impacted.

People will continue in their temporary position until the end of the term currently in place unless otherwise advised.

## **Process for casual and fixed term employees**

Casual and fixed term employees, by the nature of their employment agreements, will not have access to the change processes set out above. People in these positions may apply for any vacant or new positions which will be openly advertised through standard recruitment and selection processes.

## Appendix 2: Support through change

Work is a big part of your life. During organisational change, it's normal to have feelings of uncertainty, shock, anger, frustration, confusion, scepticism, and impatience. Please ask for support when you need it and remember to be understanding towards your colleagues who may be feeling anxious or distracted. Consider the people you feel most comfortable to reach out to for support as you navigate change, including your whānau – family, friends, kaimahi – colleagues, community and networks.

### Wellbeing support and resources

As you navigate and support others through change, remember that you can access the [Employee assistance programme](#) (EAP) which offers you and your whānau free, confidential counselling services.

In addition to EAP, there are a range of people and resources to support you at MBIE:

- Talk to your People Leader
- Contact your union delegate or representative ([PSA](#))
- Reach out to the [Wellbeing, Health and Safety Team](#) who can provide a confidential conversation and access to specialised advice.
- Connect with our [Employee-led Networks](#) which help MBIE people connect, engage and learn, and can advocate for the needs of their network members.
- Consider our [hauora wellbeing allowance](#) which enables you to claim a contribution towards the cost of health and wellbeing services.
- Call or text [1737](#) to access free counselling services.

### Learning support options

Focusing on your personal growth and development is a helpful way to direct your attention during times of change and uncertainty – to reinforce your skills and explore career interests.

There are plenty of resources and directories to explore within MBIE, including:

- [Learn@MBIE](#) – our central learning platform that holds many free e-learning courses, including a series of e-learning modules focused on [change](#), suitable for all staff.
- [Percipio](#) – the world's largest online learning library. To access Percipio, select 'team/enterprise subscription' and then enter 'MBIE' in the site name field.
- [MBIE's library](#) – a large catalogue of books and scholarly works focused on subject expertise as well as broader skillsets like leadership capability.
- Or reach out to People and Culture to discuss your development interests.

### Career development support

Our Employee Assistance Programme can assist with general career advice and is available for self-referral. This also includes budgeting and financial advice, personal development and coaching and personal legal advice.

- Learn more about EAP services: [Access support through EAP](#)
- Learn strategies for [navigating major life choices and transitions](#)