

Allocation of Units

Boards are notified of the school's unit entitlement for the following year in the September staffing notices. The entitlement is calculated using a formula based on the number of fulltime equivalent teachers to which each school is entitled.

Further information is available in the Funding, Staffing and Allowances Handbook published by the Ministry of Education.

It is a requirement of the PTCA (clause 3.9) and the ASTCA (clause 3.4) that teaching staff are consulted in the development of a unit allocation policy or review of an existing policy. This is to ensure that the process is transparent.

Units may be allocated on either a permanent or a fixed term basis provided that, in schools with four or more units, no more than 40% of units are able to be allocated as fixed term units. If a school is entitled to three or fewer units, at least one unit must be allocated on a permanent basis.

When allocating a fixed term unit or units, you must *specify in writing the period of time for which the teacher shall be entitled to that fixed term unit or units and the particular assignment or task to be undertaken for which the fixed term unit or units has been allocated.*

Once the specified time period for the fixed term unit has expired or the specified assignment or task for which it was allocated has been completed, you may *reallocate a fixed term unit or units to the same or another teacher for a further period of time or for a further particular assignment or task.*

Units are not divisible except in the case of an approved job share arrangement.

Development of a Unit Allocation Policy

The following six principles should underpin the development of a policy and associated procedures in order to determine how units should be allocated within a school:

- The unit allocation supports a logical and transparent career structure within the school.
- Units are allocated, and new roles created, on the basis of the identified needs of the school.
- Units are allocated to provide recognition and reward for leadership and management of teaching and learning, not simply workload.
- Allocation of units is based on objective criteria, i.e. to positions rather than to specific people holding positions.
- The teaching staff are consulted about the development or review of the unit allocation policy.
- The requirements of the relevant collective agreement (i.e. the PTCA or the ASTCA) are met

Reviewing your unit allocation policies

Policies and procedures should be reviewed regularly. Factors that may prompt an early review of the unit allocation policy are:

- staff turnover;
- recruitment/retention issues;

- new education initiatives; or
- changes to the school's unit entitlement.

Changes to Unit Entitlements

- The number of units a school receives may change annually, depending on staffing. The unit policy needs to be flexible enough to allow for fluctuations.
- Part 9 of the PTCA has further information about unit reduction.

Units and Career Paths

1. Units are intended to remunerate teachers in leadership positions and positions of additional teaching and learning responsibility, and to support career pathways for primary teachers.

2. They should be allocated on the basis of leadership and responsibility, the needs of the school and with consideration of a career path within the school.

3. Most schools have traditional senior and middle management positions, such as deputy principal, assistant principal, syndicate leader and curriculum leader. They may, depending on their size, have a range of other roles such as special needs coordinators, mentors for other teachers, professional development coordinators and the like. Units offer schools the opportunity to create and remunerate positions that further develop leadership capacity to meet the needs of the school.

4. Developing career pathways, supported by unit allocation, will allow for the wider distribution of roles and responsibilities.

5. A key element in the allocation process is to ensure there are clear job descriptions for positions with units attached. These should be made available in advance of the distribution of the units to teachers. This allows for equitable and transparent decisions. The job description will form part of the future evaluation and appraisal of the performance of the unit holder. This practice should apply for both permanent and fixed-term units.