



## **Sawyers Bay School - Board of Trustees**

### **'Allocation of Units' Policy**

#### **Rationale**

Effective school self-management requires an able team which is capable of sharing leadership responsibilities.

The roll of the school generates staffing allocations. Included in these allocations are Units which carry remuneration, paid by the Ministry of Education.

A 'Unit' system for middle management, and for responsibilities, forms part of the Primary Teachers' Collective Employment Agreement (PCTA).

The purpose of this policy is to ensure that salary units are allocated in a fair and equitable manner, taking account of requirements set by the MOE, in recognition of responsibilities or workload, and in a way which is consistent with the terms and intentions of the relevant CEA.

#### **1. Policy Overview**

- Some Units relate to positions of leadership responsibility; these units are attached to Management Team positions, and advertised as such during the appointment process for management positions. Once awarded, these units are permanent, and are attached to a person for the duration of their employment in that position at Sawyers Bay School.
- Further units may also be generated, and awarded on a permanent or fixed-term basis, for responsibility, reward, retention or recruitment.

Agreement on a clear, transparent and fair process for the allocation of these units will ensure that a career structure for middle management is retained and that the management needs of the school are met.

Through the appropriate use of units, a wider team of teaching staff will be able to be recognised for their contribution to the school. Units need to be allocated in such a way that the learning of the students is enhanced, and staff are given support and recognition.

This policy has been developed in consultation with the teaching staff at Sawyers Bay School.

The policy will be presented to the Board for confirmation, and recorded in BOT meeting minutes. The teaching staff will be consulted regarding any changes to the policy.

#### **2. Objectives of this policy**

- 2.1 To involve and inform teaching staff about the allocation of Units.
- 2.2 To ensure that all staff are treated equitably.
- 2.3 To enable the BOT to comply with Employment Agreement requirements.
- 2.4 To recognise the responsibility, leadership and special initiatives of teaching staff.

#### **3. Guidelines for Implementation**

- 3.1 Units are for teaching-staff salary.
- 3.2 Teaching staff may hold a mixture of permanent and fixed-term units.
- 3.3 The position status of the Deputy Principal and Assistant Principal will be maintained over that of other unit holders in the school by allocating a minimum of one permanent unit to each of those positions. Teachers with these units are recognised as having responsibilities related to school-wide programmes and effective learning outcomes.

- 3.4 Other units will be allocated, following due process, on a permanent or fixed-term basis, and all units will be used. PTCA requires that ‘a minimum of 60% of a school’s unit entitlement is allocated to teachers permanently’  
Any loss of staffing entitlement affecting the school’s ability to deliver permanent units will be dealt with in line with the provisions of the relevant employment agreement e.g. PTCA Part 9.
- 3.5 If a management-team member leaves the school, their unit(s) will not be re-allocated until the new management appointment is made.
- 3.6 The Principal will be responsible for informing the staff about the process relating to the awarding of fixed-term units.
- 3.7 In years where the roll generates fixed-term units, staff will be asked to identify initiatives that could attract fixed-term unit allocations.  
Fixed-term units are available for allocation to a teacher or teachers on an annual basis for a minimum of one term and a maximum of four terms.  
Entitlement to a fixed-term unit will cease at the expiry of the period specified.
- 3.8 Teachers may apply to the Principal for allocation of fixed-term units, or may nominate others. Applications will be received up to the end of the first fortnight of each term as the whole value of the fixed-term unit allocation may not be committed in the first term.
- 3.9 In awarding fixed-term units, priority will be given to proposals which:
- 3.10.1 are whole school initiatives
  - 3.10.2 enhance school development in curriculum or other areas
  - 3.10.3 would not otherwise be able to happen
- 3.10 The Principal is not eligible for allocation of units.
- 3.11 The Principal, after consultation with the Management team and staff, will make the final recommendation to the BOT on the allocation of units. After Board ratification, the Principal will inform teaching staff of the allocations made, and the responsibilities for which the units have been allocated.
- 3.12 In the event of dissatisfaction with unit allocation, an approach should be made to the Principal, in writing. If resolution is not achieved, a review process will involve addressing a written complaint to the BOT, who have the final responsibility for resolving any dissatisfaction; an NZEI representative or support person may be invited to help with this resolution.

## Effectiveness Review

1. This policy will be reviewed annually in accordance with the Board’s self-review timetable.
2. The review process will include opportunity for involvement by interested parents/caregivers and staff, in addition to Board members.  
Previously developed survey formats may be used as part of this review.
3. Review results will be formally noted in Board meeting minutes, and available to the school community.

Annual Review & Confirmation process completed:

Signed.....  
(Principal/BOT Chairperson)

Date .....