Background
In recent years, the School’s Research Institutes have taken an increasing role in the allocation of duties (AoD) process and in allocation of teaching duties, in particular. With the addition of line management of UE08 and UE09 academic staff to the responsibilities of Directors of Institutes (DoIs) and the planned introduction of a new Deputy Head of School (DHoS) role, to assist the Head of School (HoS) in line management of UE10 academic staff, it is proposed to formalise the involvement of these parties in the AoD process.

Action requested from the committee
Strategy Committee is asked to endorse the proposed revised approach to the allocation of duties process, noting that some of the detail of the process is yet to be worked through.

Proposed revised process
At a high-level, this will take the form of a two-stage process. The first stage will be an ‘all parties’ meeting to agree a provisional allocation of teaching duties for the ‘School’ curriculum. The second stage will be consultation between the Director of Teaching and the relevant DoI to agree the allocation of the ‘specialist’ curriculum. This will also include agreement as to which ‘specialist’ courses will run in any year.

The intent is that this will result in a provisional allocation of teaching duties, no later than the end of January. Thereafter, any changes should be relatively minor, arising from such things as unforeseen resignations, new fellowships, etc.

The first ‘all parties’ meeting should take place in the early part of November (after Sabbaticals Committee meets at the end of October).

The process requires courses to be classified as ‘School’ or ‘specialist’ and, in the latter case, assigning them to an Institute. This will obviously require verification before the classification is confirmed. The intention is to capture the classification of courses as ‘School’ or ‘specialist’, and the Institute assignment, in Theon.

The following existing Theon reports will be useful in planning the allocation of teaching duties (obviously updated with the most recent information at the time):

https://portal.theon.inf.ed.ac.uk/reports/duties/now/TP143a_Fellowships.shtml
https://portal.theon.inf.ed.ac.uk/reports/duties/now/TP143_Sabbaticals.shtml

Similar reports covering leaves of absence and temporary contract reductions will be developed with the information also recorded in Theon.
It is proposed that the process is supported by the Head of Student Services, assisted by the Studentships and Teaching Support Manager.

Full membership of the ‘all parties’ meeting will be as follows:
- Head of School
- Deputy Head of School (staff development)
- Director of Teaching
- Directors of Institutes (x6)
- Director of Professional Services
- Head of Student Services
- Studentships and Teaching Support Manager

**Equality and diversity implications** – The revised process is intended to provide increased transparency and equity in the allocation of duties.

**Resource implications (staff, space, budget)** – Whilst there will be an additional investment of time in the early part of the process, it should lead to fewer revisions later in the process, saving time at that stage and allowing earlier confirmation of timetabling requirements and teaching support needs.