

ANGUS JOINT NEGOTIATING COMMITTEE FOR TEACHERS

Joint Secretary (Teachers' Panel) Philip Jackson c/o EIS Offices 24 West High Street Forfar DD8 1BA	Joint Secretary (Angus Council) Catherine A Coull Director of law and Administration St James House Forfar DD8 2ZE
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GS/CB

Dear Colleague

AJNCT/14 (AMENDED) JOB SIZING PROCEDURES

The nationally agreed package of pay and conditions of service for Scottish teachers "A Teaching Profession for the 21st Century" included provision for the "Job Sizing" of posts held by head teachers, depute head teachers, former assistant head teachers and principal teachers. In this regard, the Scottish Negotiating Committee for Teachers had issued Circular SNCT/28 (revised) setting out the criteria which will determine whether a review of the size of a promoted post is necessary.

As you know, AJNCT/14 was issued on 20 August 2004, setting out the Job Sizing procedures to be used in Angus. These have been amended by inserting a new 3.9 which details the procedures to be used in the review process, and are attached as an **Appendix** to this Circular.

This amendment to the Local Agreement was approved by the Angus Joint Negotiating Committee for Teachers at its meeting on 22 May 2006 and subsequently ratified by the Staffing Sub-Committee on 29 June 2006.

Yours sincerely

**CATHERINE A COULL
PHILIP JACKSON**

Joint Secretaries

Enc.

cc Chief Executive
Director of Education
Acting Director of Finance
Personnel Services Manager

APPENDIX to Circular AJNCT/14 (AMENDED)

ANGUS COUNCIL

JOINT NEGOTIATING COMMITTEE FOR TEACHERS

JOB SIZING PROCEDURES

1 BACKGROUND

- 1.1 Job sizing is a part of the national agreement to improve the professional conditions of service for Teachers in Scotland, "A Teaching Profession for the 21st Century". This agreement was reached between Teachers' Representatives, Local Authorities and the Scottish Executive in January 2001.
- 1.2 A working group of the Scottish Negotiating Committee for Teachers, (SNCT) developed a toolkit to job size the posts of all promoted teaching staff in schools (Principal Teachers, Depute Head Teachers and Head Teachers). The SNCT also appointed PricewaterhouseCoopers as consultants and expert advisers to assist with the design of the toolkit and the implementation of the national exercise.
- 1.3 Job sizing is an analytical means of determining the size of posts held by Head Teachers, Depute Head Teachers, former Assistant Head Teachers and Principal Teachers. Background information about each post is collected using a job sizing questionnaire. A weighting is then given to each piece of information collected and the resultant data is aggregated to calculate the "size" of the job.
- 1.4 The job sizing toolkit designed by the SNCT working group with the assistance of PricewaterhouseCoopers reflects the duties for each postholder as outlined in Annex B of the "21st Century" Agreement. The toolkit is designed to measure a range of responsibilities under the following 4 areas:
 - responsibility for leadership, good management and strategic direction of colleagues
 - responsibility for curriculum development and quality assurance
 - responsibility for whole-school policy implementation
 - responsibility for working with partners
- 1.5 The key principles underpinning the national job sizing toolkit are:
 - the toolkit relates to the post held and not to the postholder
 - the same job sizing toolkit is used in sizing all the posts which are subject to job sizing
 - the toolkit is linked to the duties outlined in Annex B of the 21st Century Agreement
 - the toolkit has been designed to ensure that it captures all elements of the key responsibilities which attach to management posts and that information collected is as objective and factual as possible
 - the method of calculating job sizes is identical for all promoted (management) posts

1.6 The SNCT agreed the following criteria for measuring each area of responsibility within a given promoted post:

- the size of the school
- numbers of staff managed
- numbers of children registered for free school meals (as a measure of social deprivation)
- the management of budgets
- number of subjects (and numbers and levels of national qualifications) for which the postholder is responsible
- formal teaching time
- specific whole school management responsibilities
- caseload for guidance teachers

A structured questionnaire was designed to collect this information. Detailed guidance notes for each section of the questionnaire were also prepared to assist postholders in completing the questionnaire.

1.7 SNCT/24 which confirmed details of the finalised job sizing toolkit was issued to local authorities on 4 April 2003.

2 CONDUCT OF THE NATIONAL JOB SIZING EXERCISE IN ANGUS

2.1 In line with SNCT advice and guidance, the job sizing exercise for promoted postholders in Angus was carried out in the period October 2002 – February 2003.

2.2 In accordance with SNCT advice, responsibility for the management of this exercise was allocated to a member of the senior management team.

2.3 Arrangements were made to identify and train four job sizing co-ordinators, two nominated by Angus Council and two by Teachers' Representatives. The job sizing exercise was then carried out in the following stages:

- each postholder, whose post was subject to job sizing, attended comprehensive briefing sessions led by two co-ordinators, one nominated by Angus Council and one nominated by Teachers' Representatives
- following the briefing sessions, questionnaires were issued to postholders along with supporting guidance and instructions for their completion
- completed questionnaires were agreed and signed off by head teachers
- in the case of Head Teachers' questionnaires, these were agreed and signed off by Heads of Educational Services as their Line Managers
- questionnaires from individual schools were scrutinised by the two job sizing co-ordinators who had led job sizing briefing sessions for those schools; thereafter, one of the co-ordinators signed off completed questionnaires
- all completed and signed off questionnaires were sent to the PricewaterhouseCoopers data processing centre
- where there were verification or validation queries, PricewaterhouseCoopers sought more detailed information or returned questionnaires for further local scrutiny
- the data processing centre then calculated job sizes and sent a set of draft job sizes for final comment by the Council

- prior to agreeing draft final job sizing scores, the Head of Educational Service with responsibility for managing the job sizing exercise met with all four job sizing co-ordinators to discuss possible anomalies or discrepancies; in the light of those discussions a number of amendments were agreed and these were transmitted to PricewaterhouseCoopers
- definitive job sizing scores were received by Angus Council in June 2003 and letters, advising postholders of their job size and the new salary which would apply to their post on 1 August 2003, were issued on 20 June 2003.

3 SNCT/28 (REVISED) - CRITERIA TO DETERMINE THE NEED FOR A REVIEW OF THE SIZE OF PROMOTED POSTS

- 3.1 In designing the toolkit and preparing related advice for local authorities and postholders, the SNCT working group recognised the possibility of changes in circumstances which would require the agreed job size of any promoted post to be reviewed. Arrangements were therefore made to develop criteria which would determine whether a review of the size of promoted post was necessary.
- 3.2 SNCT/28 (revised) was issued on 27 February 2004. The circular, which offers comprehensive advice about circumstances which might trigger a review of the size of a promoted post, makes it absolutely clear that the review process should not take place unless there have been substantial changes to the circumstances of any post which would have a high likelihood of the review resulting in a change in job size score. It should be noted that it is not necessarily the case that a review of job size would lead to a change in the size of a post, upwards or downwards. It should also be noted that a change in job size score would of itself not necessarily result in a change of salary point. A change of salary point would only occur if a change in job size score placed the revised score in a new job size "band".
- 3.3 The review criteria set out in Appendix 1 of SNCT/28 (revised) refer to the elements of the job sizing toolkit and have to be read in conjunction with the updated job sizing questionnaire and related guidance notes which were issued as additional appendices to the circular.
- 3.4 Review criteria are graded A, B or C depending on the likely effect they will have on the overall score for a post. It should be noted that:
- type A changes will automatically lead to a review
 - type B changes will require at least one other change of type B or two other changes of type C before a review will take place
 - type C changes require at least three other changes of type C to initiate a review
- 3.5 It should be recognised that, where there are changes in allocation of responsibilities in relation to a given post, there may also be a need to check other posts against the criteria for review.
- 3.6 Where individual postholders believe a review of the size of their posts is necessary, matters should be discussed with their Head Teacher. Any decision about making a formal request for a review should be taken with close reference to the detailed review criteria provided in Appendix 1 to SNCT/ 28 (revised). Where it is the local authority which believes there is a need for a review, discussions should take place with the individual postholder, again with close reference to the review criteria.

- 3.7 A review can be triggered at two points in the year:
- (a) at the end of each school session with any review outcome being implemented from 1 August
 - (b) in December of any school session with any review outcome being implemented from 1 February

A promoted post would only normally be reviewed once in any twelve month period.

- 3.8 The review process would be very similar to the job sizing process undertaken in the national job sizing exercise; if the review criteria were met, the following steps would be taken:

- the postholder would complete a job sizing questionnaire in full
- the completed questionnaire would be agreed and signed off by the Head Teacher
- the completed questionnaire would be scrutinised by two job sizing co-ordinators, one nominated by the Authority and one nominated by the Teachers' Representatives
- once scrutinised and validated by the job sizing co-ordinators, the completed questionnaire would be signed off by one of those co-ordinators
- the completed questionnaire would be processed through the toolkit early in the summer holidays or after the Christmas break
- any resulting change in the salary point, whether increase or decrease, would be effective from 1 August or 1 February

- 3.9 One full Authority review exercise will take place each year in the months of April/May. The procedures for this annual exercise are set out in the Annex.

4 DETERMINING THE SIZE OF NEW POSTS

- 4.1 The toolkit developed by the SNCT has been designed to calculate the size of existing posts as well as new posts established within revised management structures

- 4.2 The job sizing exercise in relation to new posts will be co-ordinated by a job sizing working group led by the member of the senior management team with overall responsibility for job sizing in the Angus Education Service. The job sizing working group will comprise that senior manager and up to six job sizing co-ordinators, three nominated by the Authority and three nominated by Teachers' Representatives.

- 4.3 With the exception of Head Teacher posts, all promoted posts established in revised structures will automatically be subject to job sizing.

- 4.4 The following job sizing procedure will apply:

- job descriptions will be drawn up with reference to agreed generic job outlines; in the secondary sector, it is anticipated that, in the case of Depute Head Teacher and Principal Teacher (Pupil Care and Support) posts, only generic job descriptions will be agreed for each school (this will allow manageable rotation of remits)
- job descriptions will be agreed by the Director of Education following discussion with Teachers' Representatives
- job sizing questionnaires will be completed for all posts of Depute Head Teacher and Principal Teacher by the Head Teacher

- completed questionnaires will be agreed and signed off by the Director of Education or by a nominated senior manager
- questionnaires will then be validated and signed off by two job sizing coordinators, one nominated by the Authority and one by Teachers' Representatives
- completed questionnaires will then be processed through the job sizing toolkit
- prior to finalisation of job sizing scores for new posts, a sample of completed and signed off job sizing questionnaires will be scrutinised by the job sizing working group with a view to identifying and addressing any discrepancies or anomalies
- following amendments deemed necessary at that scrutiny meeting, arrangements will be made by the Director of Education to communicate to Head Teachers the job sizing scores for all new management posts in their schools

5 APPEALS

- 5.1 The only appeals process relates to the accuracy or otherwise of completed job sizing questionnaires.
- 5.2 The outcomes of the job sizing exercise in relation to new posts will not be subject to an appeals procedure.
- 5.3 Arrangements for appeals against the outcomes of the national job sizing exercise were that:
- postholders, who had concerns about their job sizing scores, submitted a letter of appeal to the Director of Education
 - in the event of the appeal to the Director of Education not being upheld, postholders had a right of further appeal to the Staffing Sub-Committee of the Education Committee, in terms of the grievance procedure
- 5.4 Postholders who seek a review of the size of their post and whose circumstances meet the review criteria specified in SNCT/28 (revised) would have a right of appeal against the outcome of a resizing exercise in relation to their post. The arrangements for such appeals would be as described in 5.3 above.

ANGUS COUNCIL – EDUCATION DEPARTMENT

JOB-SIZING REVIEW PROCEDURES

1. Collate appropriate data following the September census date each year e.g. staff numbers, budget information, free school meals and pupil transport data.
2. Enter data into Access database.
3. Print off “Comparative Data” page for each school.
4. By late March compare each school’s previous year’s details (year 1) with those of the most recent (year 1 + 1) e.g. 2005 data compared with what was held for 2004.
5. Identify those posts which have been affected by the amended data and are therefore subject to Review.
6. Important to note that posts will be subject to a Review if the new details meet the review criteria set out in SNCT/28 Appendix 1.
7. One full Review exercise will take place each year in the months of March / April and any salary amendment resulting from that Review will be effective from the following 1st August.
8. All substantive promoted posts which fall vacant will be subject to a review and may therefore be re-sized prior to an advertisement being placed.
9. The base details to be used for each school will be the previous year’s census data, for example, in March / April 2006 the data from the September 2005 census will be used.
10. A Review can lead to the job-size score for a post either increasing or decreasing.
11. Once a post has been identified as meeting the review criteria, a Review Sheet should be completed and discussed with the appropriate member of the Senior Management Team.
12. When the Review Sheet is completed, a blank Job-Sizing questionnaire should be issued to all post holders affected by the review exercise.
13. On return of the completed questionnaires, arrangements will be made for two Job-sizing co-ordinators to meet and sign off the documents.
14. The questionnaires should then be processed through the “Toolkit” to ascertain the new job-size for each post.
15. A meeting with the Job-Sizing Working group should be arranged by no later than the third week of May to confirm the outcomes of the Review exercise.
16. The post holders should then receive a letter indicating the new job-size score for the post, and any salary adjustment should be issued by no later than the last week in June. Copies of such letters will be copied to the Staffing Section for information or action, as appropriate.