

JS 17/71**Job Sizing – Questions and Answers****Guidance**

Further to national Job Sizing Training the SNCT has considered a number of frequently asked questions and has developed answers. The questions supplement the SNCT provisions relating to job sizing set out in the SNCT Handbook, Part 2, Section 1, paragraphs 1.31 – 1.35, Appendices 2.2, 2.2A, 2.2B, 2.3 and 2.3A.

The Job Sizing Toolkit and Guidance Notes were reviewed by the SNCT in 2010 (SNCT 10/20).

The initial FAQs were intended for post holders and were incorporated into the review of job sizing in 2010. It is now more likely that FAQs will be used by post holders to inform reviews or to be used by Job Sizing Co-ordinators to inform the sizing of vacancies.

It is important to remember a number of key factors of job sizing.

- Job Sizing relates to the post and not to any individual post holder.
- Job Sizing is an exercise to be undertaken by Job Sizing Co-ordinators, appointed by the local authority and by the recognised trade unions.
- Where new posts are being sized then LNCTs are charged by the SNCT with agreeing, locally, specific duties and job remits. Each LNCT should also agree locally promotion procedures to be followed.
- Job Sizing measures the size of whole school data and responsibilities of the post; it does not measure workload.
- Job sizing is a two stage process: the Review Stage and, if required, a full re-job sizing through the SNCT toolkit. Data should only be processed through the toolkit if the review Criteria have been satisfied.

In addition, the SNCT encourages each LNCT to have a policy on how job sizing will be conducted locally. This should make explicit, that part of the process requires job sizing coordinators to have access to school timetables. Each LNCT should ensure that whole school information is made available to the LNCT. An example of how whole school

COSLA

Verity House
19 Haymarket Yards
EDINBURGH
EH12 5BH
T: 0131 474 9200
F: 0131 474 9292
E: tomy@cosla.gov.uk

Teachers' Panel

46 Moray Place
Edinburgh
EH3 6BH
T: 0131 225 6244
F: 0131 220 3151
E: lwilson@eis.org.uk

Scottish Government Learning Directorate

2a South Victoria Quay
Edinburgh
EH6 6QQ
T: 0131 2440230
F: 0131 244 0957
E: Stephanie.walsh@scotland.gsi.gov.uk

information is shared, is appended from one LNCT on how whole school information is shared. LNCTs should retain copies of data against the post.

Q1. Should vacant promoted posts be sized prior to advertisement?

When a vacancy occurs, the detailed job description is determined in accordance with the devolved powers of the LNCT. An extant post should not be resized if there is no change in remit and none of the review criteria have been met.

While normally reviewing and/or sizing a post as appropriate should occur prior to advertisement there may be exceptional circumstances where a post is advertised prior to review. In such circumstances the advertisement should make it clear that the salary of the post is subject to job sizing. However, every effort should be made to clarify the actual salary for the post prior to interview and appointment.

It is important that if a change to remits or management structure is to occur as a result of the vacancy (e.g. reduction/increase in number of DHTs) consideration be given to the implications on job sizing for that post and other posts which may be affected

Q2. How are new National Qualifications counted?

The SQA has published a summary of the new qualifications and these replace previous or existing National Qualifications.

SCQF	New National Qualification	Replace	Previous or existing NQ
1	National 1		Access 1
2	National 2		Access 2
3	National 3		Access 3 Standard Grade (Foundation)
4	National 4		Standard Grade (General) Intermediate 1
5	National 5		Intermediate 2 Standard Grade (Credit)
6	Higher (new)		Higher
7	Advanced Higher (new)		Advanced Higher

Example

A PT English is responsible for 6 classes in S3 studying National 3, National 4 and National 5, 7 classes in S4 studying at the same level, 5 classes in S5 studying National 5 and Higher and 3 classes in S6 studying Higher and Advanced Higher.

This would be scored as follows:

	Subject	NQ	Classes
S3	1	3	6
S4	1	0	7
S5	1	1	5
S6	1	1	3

Each level of NQ, Higher and Advanced is credited once although offered in different year groups.

Care should be taken when considering faculty heads where there are also PTs to ensure double counting does not occur.

The SQA website (<http://www.sqa.org.uk>) sets out details of subjects in the catalogue. Units are not normally awards but can be a separate subject. Some awards are not delivered by SQA but can count subject to the following criteria:

- (i) that there is a requirement for the teacher to carry out bureaucratic work related to the exam;
- (ii) that the subject is timetabled (e.g. sports leadership, Caritas Award (SCES) during pupil hours and not extra-curricular.

Annually, schools are required to complete the Scottish Government's Healthy Living Survey (formerly free school meals). The survey is carried out in February of each year and it is this data that should be used when determining a free school meals entitlement.

Q3. Free School Meals – How should we deal with free meal entitlement?

The SNCT agreed that the deprivation factor is captured through free meal registration in the job sizing toolkit. This should be based on the data provided in the Scottish Government Healthy Living Survey published annually in June.

Some schools may offer all children a free meal (e.g. music schools) but since the free meal figure should reflect entitlement, only those children who are receiving a free meal as per the Scottish Government eligibility criteria should be counted.

The % for P4-P7 free meal registration should be taken as a % of the P4-P7 school population and applied as a whole school percentage.

Job Sizing Coordinators should report to the LNCT joint secretary any implications the use of P4-7 are having.

Q4. Free School Meals – How do you score a P1/P3 school?

There are 2 options in this scenario. Firstly, the historic data prior to the introduction of universal P1/P3 free meal registration can be continued. The second option is that the job sizing coordinators could use a “felt fair” approach by comparing the school to adjacent schools in the local authority area. The same policy should be used for stand-alone nursery/pre-schools.

Q5. How are rolls for Nursery provision for 2 year olds counted?

A 2-year-old nursery group should be counted as a separate class, with a morning group or afternoon group counted as separate classes. The roll for 2 year olds is based on the number of places in each session, not the uptake.

Q6. In Job Sizing a shared headship what considerations are required?

When job sizing a shared headship, the whole school information for both schools should be aggregated. It is recognised that a non-teaching shared head may only have a minimal uplift in salary when previous post holders in each school may have scored from teaching time. In such circumstances, it is open to the local authority to apply paragraph 1.73, Part 2, of the Handbook which states:

“Where a teacher is appointed to a promoted post with a view to preparing for the opening of a new school/the expansion of an existing school, or where a teacher already serving in the school is required to make the preparations and is to continue to serve in the post after the opening of the school/while the expansion is taking place, the salary of the teacher may be increased by such amount as the local authority consider appropriate.”

Where this paragraph is applied the SNCT should retain a written record of the decision.

Any payment seen as appropriate can be paid under “acting arrangements”. However, this is a matter which requires further consideration by the SNCT.

Q7. We are opening a new school. How do we establish an indicative school roll?

An indicative school roll is desirable to attract applicants for promoted posts. Job Sizing Co-ordinators should use a “felt fair” approach. For example, when opening a new secondary school, the S1 roll can be extrapolated for S1 to S4; the S5/S6 roll can be estimated by using figures from schools with a similar S1 cohort.

Similarly, when opening a new primary school, the P1 roll can be compared to other primary schools to give an estimated score for the new school.

When using estimated rolls, job sizing coordinators should be careful when the estimated roll is very close to a banding. Similarly, when opening a new primary school, the P1 roll can be compared to other primary schools to give an estimated score for the new school.

The alternative is to apply paragraph 1.73, Part 2 of the SNCT Handbook which states:

“Where a teacher is appointed to a promoted post with a view to preparing for the opening of a new school/the expansion of an existing school, or where a teacher already serving in the school is required to make the preparations and is to continue to serve in the post after the opening of the school/while the expansion is taking place, the salary of the teacher may be increased by such amount as the local authority consider appropriate.”

Q8. A Primary PT has responsibility for one aspect of the curriculum across all stages. How is this scored in 3.3. of the questionnaire?

This is clearly set out in Job Sizing guidance notes. Job Sizing Co-ordinators will have to calculate how much of the curriculum the PT is responsible for. The PT then gets credit for that % of all the classes in the school. It is essential to ensure that the total number of classes in the school is not exceeded.

Q9. I understood the SNCT has provided advice on non-school promoted posts. Where can I find that advice?

There is provision in paragraph 1.75, Part 2, of the Handbook which states:

“Where a teacher has been appointed to a post not described in Section 2 (Main Duties) of this Scheme but the duties of the post are considered by the local authority to be similar to the duties of a post described in the Scheme, the provisions in this Section shall apply.”

The original advice Non School Based “Promoted Posts” was issued on October 2004 and states

The Joint Secretaries have been asked to provide advice on “promoted posts” where the post holder does not work in a school situation and where the use of the job sizing toolkit would therefore be inappropriate to assess the post. In some circumstances the title of the post may not be a title covered by the 2001 National Agreement but there may be a contractual analogue to posts identified in the Agreement or in the Scheme of Salaries and Conditions of Service.

Such posts would include, for example, learning support co-ordinators and network managers.

The Joint Secretaries would offer the following advice:

- (a) A management decision should be taken to assess the job by benchmarking rather than by applying the toolkit inappropriately.
- (b) Benchmarking should, where possible, follow the general principles established in the toolkit, by examining responsibilities carried such as staff management, financial management and working with others and making reference to job sized posts of similar status. In gathering evidence on which to make comparisons local authorities should liaise with job sizing co-ordinators.

- (c) When the benchmarking exercise has been completed the local authority will determine the salary point ensuring that it is appropriate on a “felt fair” basis.
- (d) Consideration should also be given to the use of Education Support Officer or Quality Improvement Officer scales if appropriate, and discussions made at an LNCT level.
- (e) Where benchmarking is to be applied, the rationale should be clearly documented to ensure that there can be a robust defence, should there be an equal pay challenge.

Q10. A school wishes to fund an additional DHT via its Devolved School Management (DSM) budget, what are the practical implications of this?

Consideration must be given to a number of matters.

1. Are the duties the additional DHT is undertaking being credited to another postholder? (i.e. there cannot be double counting).
2. Will the additional budget be in place for a period in excess of 2 years and will the postholder be undertaking the duties for a period of in excess of 2 years?
3. Will another postholder be subject to detriment as a result of this arrangement?

Authorities must ensure a felt fair principle is put in place for both substantive and additional postholders, it would be unfair to if a substantive postholder suffered a detriment if the appointment is for a short period.

If the extra appointment will last beyond 2 years this should be dealt with under job sizing. It should be noted that if the additional post holder takes on duties from other DHTs all posts should be considered in job sizing.

Q11 A school wishes to “equalize” the job sizing of Depute or Guidance/Pastoral Care team. What issues have to be considered?

Such equalisation requires a policy/decision and job remits require to be agreed by the LNCT. Therefore, it is not a job sizing issue in the first instance. The equalisation, however, requires to be considered by job sizing coordinators in dialogue with the Headteacher. A form should be completed for each post. Where Deputes rotate duties to gain experience job sizing, review criteria should be considered to determine whether a resizing is required.

Q12 If a DHT is class committed for a % of the week what can they claim for as teaching hours?

Class committed DHT's can claim for their FTE teaching hours based on the maximum of 22.5 hours per week. Job sizing coordinators should ensure it is the FTE of 22.5 and not 25 that is accounted for. The timetabled class commitment must also be permanent and not as a result of short term cover due to staff shortages.

Q13 There is still some ambiguity over line management, in relation to pastoral care staff. Can further guidance be provided?

During registration, where appropriate, guidance/pastoral care staff have responsibility for pupils for whom they are credited in case load. This does not assume line management of register teachers. However, guidance/pastoral care staff may have responsibility for programmes of Social Education. As such they will have responsibility for the curriculum and responsibility for directing teachers in class work, for pupil discipline in those classes and may contribute to CPD review of those who teach Social Education programmes. This can be counted subject to the principle of the double counting.

Q14 If a promoted post holder holding a promoted post on a job-share basis leaves, should that vacancy be sized?

Job sharers share a post and it is the post which is sized, not individual job share elements. Unless the review criteria for the post have been triggered then a job share vacancy for part of a post should not be job sized.

Q15 If a sized PT post is in excess of 196 points what should happen?

196 points is the maximum a Principal Teacher can score (there is no maximum score in the Headteachers and Depute Headteachers scoring). If the score exceeds 196 points the job is too big. This should be referred back to the school, to the Chief Education Officer and to the LNCT.

Q16 If a Principal Teacher (e.g. a Home Economics PT is accountable for money collected from pupils for comestibles can this be counted?

The guidance states that monies collected from parents should be excluded. However, where money is collected at departmental level and that money is spent by the department credit should be given to that PT.

Q17 Does a PT English or Maths have a claim under section 5 for leading literacy and numeracy?

This can only be claimed if there is demonstrable evidence of leadership. For example, if a PT Maths conducts numeracy workshops for parents, section 5.1 can be ticked.

Job Sizing

Q18 Are Foreign Language Assistants counted in job sizing?

Foreign language assistants will not normally be deployed for a complete school session. In addition, they may be working across schools in different local authorities. Direct line management is also likely to take place at local authority level. However, for job sizing coordinators may provide some weighting in section 2.2 taking account of part year working and pro-rated class contact time if line management responsibility is held in full or in part by a PT.

Q19 What should happen if Job Sizing Coordinators cannot agree when signing off a job sizing form?

This should be set in local guidance. The LNCT should arrange to resolve this matter but may seek advice informally from the SNCT Joint Secretaries in the first instance. If the LNCT is unable to resolve the matter it shall go to the SNCT formally for determination.