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East Dunbartonshire Council

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Education Procedure Manual 2/03

Recruitment and Selection Procedures for Posts of Principal Teacher (Curriculum, Guidance and Curriculum Support) in Primary, Secondary and Special Schools

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Appendix 1 The Toolkit for Managers

- **Vacancy Paperwork**
- **Advert paperwork**
- **Application paperwork**
- **Leeting and interview paperwork**
- **Appointment Paperwork**
- **Guidance Notes**

Monitoring and Review

This procedure manual will be reviewed in accordance with:

- Legislative change
- Changes to SNCT national conditions of service
- Other external factors
- Feedback on the effectiveness of the policy
- Requests for review by Elected Members, Trade unions and/or Management.

Alternative Formats

All Education Procedure Manuals can be found on The Hub and East Dunbartonshire Council's website. The Procedure Manual and the associated Appendix can also be made available, on request, in a variety of formats. These can be requested from the Customer Services and Transformation team by contacting 0141 578 8471. Information will be made available in accordance with the Council's Accessible Information Policy.

1.0 INTRODUCTION

- 1.1 The aim of recruitment and selection procedures is to ensure that the best possible candidate for the post is appointed. This manual describes in detail the procedures for recruiting and selecting staff to permanent principal teacher posts in schools within East Dunbartonshire Council. The same process may be applicable when appointing staff to temporary posts.
- 1.2 These procedures comply with current legislation and guidance, namely:
- East Dunbartonshire Council - Recruitment and Selection Policy and Procedures
 - The Equality Act (Scotland) 2010
- 1.3 Recommendations for appointments to principal teacher posts in schools are made to the Chief Education Officer by appointment panels set up by the authority.
- 1.4 The main stages in the recruitment and selection process are:
- Advertising posts
 - Applications
 - Leeting
 - Interview
 - Appointments

These stages are considered in some detail in the following sections.

- 1.5 For Principal Teacher posts, all the selection arrangements will be undertaken by the Head Teacher.
- 1.6 Applicants/ candidates who consider that the recruitment and selection process has not complied with Council policy or equal opportunities legislation can make an informal complaint to the Chief Education Officer through the Employee Complaints Procedure (EDC Education Procedure Manual 2/20) or formally through the Grievance Procedures (EDC Education Procedure Manual 2/19)

2.0 PRINCIPLES

- 2.1 The quality of promoted staff in schools is vital to the effective implementation of the policies of East Dunbartonshire Council and the provision of the best possible education in the authority's schools.
- 2.2 These procedures are based on the principles of fairness, transparency, objectivity and consistency.
- 2.3 Throughout the process of recruitment and selection, there must be justifiable reasons for all decisions made.
- 2.4 East Dunbartonshire Council is an equal opportunities authority. The general aim of its equal opportunities policy is to ensure that no job applicant or employee receives less favourable treatment than any other on grounds such as race, colour, nationality, ethnic or national origins, religion, age, sex, sexuality, marital status or disability. No job applicant or employee should be disadvantaged by conditions or requirements which cannot be shown to be justified.
- 2.5 The Council will fulfil its statutory obligations in relation to the filling of promoted posts in denominational schools.

3.0 ADVERTISING A POST

3.1 In general, national open advertising of vacancies for Principal Teacher posts will be the norm in order to promote open and fair competition. Temporary vacancies may be filled without national advertisement.

3.2 In some circumstances, however, because of statutory obligations to existing employees, or other significant reasons, the education authority may decide, to restrict applications to existing teaching staff or to fill the post by redeploying an existing Principal Teacher, currently employed elsewhere. This may occur in situations of school mergers or closures or in falling roll situations where a principal teacher is deemed to be surplus.

3.3 *JOB SIZING*

When it is known that an existing promoted post is to become vacant, the Head Teacher should request an 'Application for Review of a Job Size' from the authority. Full details about reviewing the job size of a vacant post are contained within Section 3 of Procedure Manual 2/29 : Procedures for Job Size Review and Re-Job Sizing (Teachers).

3.4 *SUBMISSION OF VC FORM*

The Head Teacher should complete and submit a Vacancy Control (VC) form, available on the HUB or from HR Service Support , to the authority for approval. A post will not be advertised until all documentation has been received and approved. A copy of the VC form is contained in the **Toolkit for Managers**, attached as Appendix 1.

3.5 *ROLE PROFILE*

A Role Profile, as agreed through LNCT, is available for each post, available on the HUB or from HR Service Support. It has regard to national and local agreements and indicates clearly the job designation, the purpose of the post, the main duties, the reporting arrangements and any other relevant factors. Nationally agreed duties and East Dunbartonshire Role Profiles are set out in the **Toolkit for Managers**, attached as Appendix 1.

3.6 *PERSON SPECIFICATION*

The Person Specification describes the attributes required for the post. It lists the essential and desirable requirements in terms of qualifications, experience, knowledge, skills and personal qualities. Essential requirements are the absolute minimum requirements for an individual to fulfil the post and form the criteria to be used during the leeting exercise. Desirable requirements are the qualities, skills and experience that would be of benefit to an individual within the post. These should not be referred to in making short leet decisions unless the volume and quality of the applications necessitates this.

The person specification should not be changed in any way once the recruitment and selection process has commenced. A sample Person Specification is contained within the **Toolkit for Managers**, attached as Appendix 1.

3.7 *SCHOOL PROFILE*

The School Profile should include information about the aims of the school, its roll and capacity, a brief description of the building, its catchment area and any other relevant details.

3.8 *THE RECRUITMENT PORTAL*

The post will be advertised on MyJobScotland, the national recruitment portal, and will contain basic information about the post and the school. It will indicate where applicants can obtain further information about the post. The advert will also state the closing date for applications and how application forms should be submitted.

4.0 APPLICATION FORMS AND REPORTS

- 4.1 Application for promoted posts can be made by any teacher who is registered with the General Teaching Council Scotland (GTCS) and who is suitably qualified for the post.
- 4.2 All documentation relating to a vacant post will be posted on MyJobScotland, the national recruitment portal.
- The Role Profile and Person Specification for the post
 - The School Profile
 - Application Form
 - Report Form - a sample form is attached in the **Toolkit for Managers**, attached as Appendix 1.
 - Approval of Teachers in Catholic Schools (to be completed where appropriate) – a sample form is attached in the **Toolkit for Managers**, attached as Appendix 1.
 - Equal Opportunities Monitoring Form
 - Criminal Convictions Form
- 4.3 The Application Form and other documentation should be completed electronically and submitted through MyJobScotland, the national recruitment portal.
- 4.4 The Report Form must be completed by the applicant's current Head Teacher.
- 4.5 Any false information given on application forms or at the interview stage could lead to disqualification from the recruitment and selection process and could lead to disciplinary procedures being invoked. If a fraudulent declaration is discovered after the individual has taken up post the offer of appointment may be withdrawn.

5.0 TRAINING FOR MEMBERS OF LEETING/SELECTION PANELS

- 5.1 All those involved in the recruitment and selection process should be familiar with the contents of this Procedure Manual and should undertake the recruitment and selection training which is delivered by the authority.

6.0 RECRUITMENT AND SELECTION PROCESS: POSTS OF PRINCIPALTEACHER

- 6.1 The leeting process for any Principal Teacher post must provide for robust professional screening to ensure that candidates going forward to interview are appropriately qualified and satisfy the essential criteria for the post.

COMPOSITION OF THE LEETING PANEL

- 6.2 The leeting panel for a Principal Teacher post will normally consist of:
- the Head Teacher of the school, who will chair the leeting panel,
 - a representative of the Education Service, appointed by the Chief Education Officer. This could be a Head Teacher/Depute Head Teacher of another school or some other senior member of staff.
 - a teacher of equivalent rank and designation (ie PT Curriculum, PT Guidance or PT Curriculum Support)
- 6.3 No two members of the panel should be members of staff from the same establishment.
- 6.4 The chair of the leeting panel will have both a deliberative and casting vote.

- 6.5 Leeting / interview panels will not, other than in exceptional circumstances, consist solely of members of one sex.
- 6.6 Members of leeting / interview panels must declare, in advance, to the Head Teacher any relationship or close friendship with any of the applicants/candidates that could suggest bias, which might be a factor in any professional judgement made during the selection process. The Chief Education Officer will be informed and will decide whether any substitution is necessary.
- 6.7 Canvassing of a member of the leeting or interview panel, whether directly or indirectly, by an applicant for a promoted post may disqualify the applicant from consideration for the post in question and could lead to the Council's disciplinary procedures being invoked.

SELECTION CRITERIA FOR THE LEET

- 6.8 To assist in the initial consideration of applications and reports, a list of selection criteria reflecting the Role Profile and Person Specification will be drawn up.
- 6.9 The criteria will conform to a general pattern established by the authority but may vary in detail according to each post. They will include:
- registration with the GTCS
 - evidence of approval by the Roman Catholic Church (where appropriate)
 - appropriate qualifications
 - previous experience
 - record of professional development
 - evidence of ability to work with and lead other people
 - evidence of good management skills
 - evidence of good communication skills
 - evidence of ability to implement change

FORMAT OF THE LEETING MEETING

- 6.10 Each member of the leeting panel will normally receive all Application Forms prior to the meeting of the panel.
- 6.11 The leeting panel must establish the leet with reference to the essential criteria and, where applicable, the desirable criteria. If an applicant does not meet the essential criteria, they should not be called for interview.
- 6.12 The Short Leeting Assessment Summary, contained within the **Toolkit for Managers**, attached as Appendix 1, should be completed for each applicant.
- 6.13 The Competency Scoring Matrix: Applicant Assessment for Short Leeting, contained within the **Toolkit for Managers**, attached as Appendix 1, should be completed at the end of the meeting.
- 6.14 Any applicant who has been displaced from an equivalent post, within East Dunbartonshire Council, must be placed on the leet.
- 6.15 Any applicant with a disability must be placed on the leet, if she/he meets all the essential criteria.
- 6.16 A preliminary interview stage (long leet) may be required where there is a substantial number of applicants. The interview panel members for this preliminary stage will be the group who drew up the leet. The Head Teacher will be the chair at this stage and have both a deliberative and a casting vote.

- 6.17 A written record of the leeting process and the preliminary interview stage (if required) will be retained by HR Service Support for a period of six months from the end of the recruitment and selection process.

DECISION OF THE LEETING PANEL

- 6.18 Applicants who have met the criteria for interview will be informed, normally within 3 weeks after the closing date.
- 6.19 Applicants who have not met the criteria for interview will be informed within a reasonable time after the closing date, normally within 4 weeks.
- 6.20 The panel has the authority to decide to re-advertise the post rather than to draw up a leet, if it believes that to be the most appropriate course of action.

VISITS TO THE SCHOOL

- 6.21 All applicants who have been leeted should have the opportunity to visit the school to allow them to be briefed on major issues affecting the school, to meet the appropriate staff and to seek any information about the school which they feel might be helpful to them.
- 6.22 The panel should consider the accessibility of visits to schools and the location of interviews. Individuals may require adjustments to be made, in accordance with equality legislation.
- 6.23 These visits should not be organised in such a way as to form part of the selection process. All visiting candidates should be treated fairly and consistently.
- 6.24 Travel and subsistence expenses will not be paid in connection with such visits.

THE INTERVIEW PANEL

- 6.25 The members of the interview panel for Principal Teacher posts will be the same as those who were on the leeting panel.
- 6.26 The chair will have both a deliberative and a casting vote.

FORMAT OF THE INTERVIEW

- 6.27 The format of the interview should be determined in advance by the panel. Guidance notes on interviews are contained in the **Toolkit for Managers**, attached as Appendix 1
- 6.28 A formal interview will continue to play a key role in determining which of the leeted candidates should be recommended for appointment. .
- 6.29 Variations to the traditional interview may be considered provided that the interview panel feels confident in using the techniques involved. The traditional question and answer format could be supplemented in the following ways:
- asking candidates to carry out a relevant exercise just prior to the interview
 - devoting the first part of the interview to a prepared presentation by candidates on an educational topic of which they will have been informed in advance. The initial questioning would relate to the presentation.
- 6.30 The interview should allow the same time for each candidate, with the minimum time normally between 30 and 40 minutes.

- 6.31 Each candidate should be asked the same standard questions. Further probing questions may be necessary.
- 6.32 Candidates must bring a completed criminal convictions form, in a sealed envelope, to the interview. This should be considered by the panel immediately before the interview in order that any clarification required can be sought from the candidate at the interview.

EVALUATION OF CANDIDATES

- 6.33 The Panel Interview and Scoring Summary should be completed. A sample form is contained in the **Toolkit for Managers**, attached as Appendix 1.

AFTER THE INTERVIEW

- 6.34 At the end of the selection process the interview panel will make a recommendation for appointment to the post. The Head Teacher will advise the successful candidate, usually by telephone, as soon as practically possible, that he/she has been recommended for appointment and will forward the appropriate paperwork electronically to the authority.
- 6.35 Where a candidate has been offered a post but does not accept, the interview panel should reconvene to consider if the post can be offered to the next most suitable candidate. If this is not appropriate, the post should be re-advertised.
- 6.36 An Appointment Form, a copy of which is contained in the **Toolkit for Managers**, attached as Appendix 1, should be completed and forwarded to HR Service Support.
- 6.37 A formal offer of appointment/statement of employment particulars, subject to pre-employment checks, will be issued, in writing, to the successful candidate, by the authority.
A sample contract is included in the **Toolkit for Managers**, attached as Appendix 1
- 6.38 A programme of induction will be arranged prior to the employee assuming the post.
- 6.39 All candidates, who were unsuccessful at interview will be informed as soon as practically possible and will be given the opportunity to discuss their performance at the interview with the Head Teacher. Information about the applications and/or performance at interview of other candidates should not be discussed during feedback.
- 6.40 The panel has the authority to decide to re-advertise the post rather than to select a candidate at interview, if it believes that to be the most appropriate course of action.
- 6.41 All documentation relating to the recruitment and selection exercise should be forwarded to HR Service Support and will be retained for a period of six months from the end of the recruitment and selection process.
- 6.42 Under data protection legislation candidates may request access to their assessment forms.