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**East Dunbartonshire Council**

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## **Education Procedure Manual 2/29**

# **Procedures for Job Size Review and Re-Job Sizing (Teachers)**

Revised March 2018

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### **Relevant Documentation and Sources**

#### **SNCT Handbook of Conditions of Service including Review Criteria, Job Sizing Questionnaire, and Notes of Guidance**

- [www.snct.org.uk](http://www.snct.org.uk)
- Head Teacher/School Support Manager
- Job Evaluation Team
- Teacher Trade Union Representatives

#### **EDC Role Profiles for Promoted Posts in Teaching and Support Services**

- Head Teacher/ School Support Manager
- Job Evaluation Team
- Teacher Trade Union Representatives

#### **Applications for Review of Job Size**

- Job Evaluation Team

## **1.0 Introduction**

- 1.1 In accordance with the Scottish Negotiating Committee for Teachers (SNCT) Conditions of Service, all promoted posts in teaching are job sized, with promoted teachers placed on an appropriate salary point, as determined by the job sizing process.
- 1.2 Any promoted post which is not part of the agreed promoted post structure of the school, must be approved by the Chief Education Officer and, if appropriate, the Local Negotiating Committee for Teachers (LNCT), before it is job sized.
- 1.3 The SNCT Handbook of Conditions of Service, Part 2, Appendix 2.2 outlines the process for job sizing. Annex A contains the Job Sizing Questionnaire and Notes of Guidance. Additional Notes of Guidance were published by the SNCT (JS17/71) in January 2017. (See **Appendices 2 and 3** of this paper). Annex B contains the Job Size Score Allocation to Salary Spines. (See **Appendix 4** of this paper). The SNCT Handbook of Conditions of Service and a copy of the Job Sizing Toolkit are available at [www.snct.org.uk](http://www.snct.org.uk).
- 1.4 The job sizing process is based on a Job Sizing Questionnaire which captures whole school data provided by the authority and information on key responsibilities of the post provided by the postholder/Head Teacher/ Chief Education Officer (as appropriate).
- 1.5 Whole school data consists of the school roll, number of staff in the school, percentage of children registered for free school meals, size of the school budget and the number of children for whom transport is provided.
- 1.6 When whole school data for any one school is processed through the Job Sizing Toolkit, a base score for each of the promoted posts in that school is created.
- 1.7 Information on key responsibilities of the post is gathered through the Job Sizing Questionnaire under the headings of
  - Management and Strategic Direction of Staff
  - Curriculum Development and Quality Assurance
  - Implementation of Whole School Policy
  - Working with Partners
- 1.8 All responsibilities which are job sized must be permanent and contained within the relevant Role Profile, as agreed through LNCT. Any responsibility which is part of a remit for 2 years, or longer, should be included in the job sizing of a post.
- 1.9 Over time there may be significant changes to whole school data and/or responsibilities of any particular post and this may necessitate a review of a job size to ensure that the post is still sized appropriately with the commensurate salary attached to the post.
- 1.10 The SNCT Handbook of Conditions of Service, Part 2, Appendix 2.3 outlines the process of reviewing a job size. Annex A contains the SNCT Review Criteria. (See **Appendix 1** of this paper)
- 1.11 Change(s) to the whole school information and responsibilities of the post are first reviewed against the SNCT Review Criteria. If sufficient criteria are met, the post is re-job sized and full details processed through the Job Sizing Toolkit.

- 1.12 A review of a job size of a post does not necessarily lead to a re-job sizing of a post. If the SNCT Review Criteria are not met then the review is complete and there is no further processing of information through the Job Sizing Toolkit at that time. The post remains on the same salary point as before.
- 1.13 The job size of a promoted post should be reviewed in the following circumstances.
  - 1.13.1 When an existing post becomes vacant and prior to advert (see **SECTION 3.0** of this paper)
  - 1.13.2 When a postholder/ requests a review of an individual post in the belief that aspects of the whole school information and/or the responsibilities of a post have changed significantly since a previous job sizing (see **SECTION 4.0** of this paper)
  - 1.13.3 When the Authority believes that aspects of the whole school data and/or the responsibilities of a post/posts have changed significantly since a previous job sizing (see **SECTION 5.0** of this paper)
- 1.14 A review of a job size may lead to a full re-job sizing of the post (see **SECTION 6.0** of this paper).

## **2.0 Job Sizing Co-ordinators**

- 2.1 The authority has a register of trained Job Sizing Co-ordinators consisting of management and teacher trade union representatives, nominated by the LNCT.
- 2.2 A Job Sizing Co-ordinator must have received training either directly by the SNCT trainers or by other trained job sizing co-ordinators within the authority.
- 2.3 Two Job Sizing Co-ordinators (one management and one teacher trade union representative) will be involved in a job sizing/review exercise.
- 2.4 The role of the Job Sizing Co-ordinators is to work together to ensure that the job sizing process is efficient, fair and transparent. They are tasked to:
  - 2.4.1 Consider Applications for Review of job size and, using the SNCT Review Criteria, decide whether a full re- job sizing of a post is necessary.
  - 2.4.2 Provide advice on interpretation of terms and/or assistance with completion of the relevant documentation.
  - 2.4.3 Validate and confirm agreement off all information submitted in the Job Sizing Questionnaire.
  - 2.4.4 Process all data through the Job Sizing Toolkit.
  - 2.4.5 Complete a Record of Review.
- 2.5 Meetings of Job Sizing Co-ordinators are convened as required for purposes of validating and agreeing questionnaires. .

### **3.0 Reviewing the Job Size of a Vacant Promoted Post**

- 3.1 A promoted post will not normally be advertised until the job size has been reviewed. If, due to exceptional circumstances, a vacant post is advertised prior to the finalisation of the review of job size, the advert should be marked clearly with ‘salary subject to job sizing’. Every effort should be made to clarify the actual salary for the post prior to interview and appointment.
- 3.2 A review of the job size of a vacant post can take place at any time during the school session. Under normal circumstances a post will be reviewed only once in a twelve month period.
- 3.3 When Resource Planning intimate that an existing promoted post is to become vacant, the Job Evaluation Team will collate the whole school data and seek information on the responsibilities of the post from the Head Teacher or the Chief Education Officer (in the case of a Head Teacher post). A proforma is available for collating this information.
- 3.4 The Job Evaluation Team will complete the Application for Review with the whole school data and the responsibilities of the post, relating to the last job sizing of the post. The current whole school data and the current responsibilities of the post, as provided by the Head Teacher/Chief Education Officer (as appropriate), will also be added.
- 3.5 The completed Application for Review will be sent to the Head Teacher/Chief Education Officer (as appropriate) for checking and confirming agreement.
- 3.6 Advice on interpretation of terms is available from the Job Sizing Co-ordinators.
- 3.7 The completed and agreed Application for Review should be forwarded to the Job Evaluation Team
- 3.8 A Job Sizing Questionnaire should **not** be completed and submitted at this time.
- 3.9 The Job Sizing Co-ordinators will consider the Application for Review against the SNCT Review Criteria. (See **Appendix 1** of this paper : SNCT Review Criteria)
- 3.10 Changes to whole school data and post responsibilities are graded - Type A, Type B and Type C – depending on the likely effect they will have on the overall score for a post.
- One type A change automatically initiates a re-job sizing of the post.
  - Two type B or one type B and two type C changes are required to initiate a re-job sizing.
  - Four type C changes are required to initiate a re-job sizing.
- 3.11 Some changes apply only to certain posts. This is based on whether or not the particular section of the questionnaire impacts on the size of that type of post.
- 3.12 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have been met, they will inform the Head Teacher/Chief Education Officer (as appropriate) that a re-job sizing of the post is required (see **SECTION 6** of this paper).
- 3.13 Consideration will be given to whether changes to the whole school data and/or responsibilities of the post could have a possible impact on the job size of any other promoted post(s) in the school, which may as a result require to be reviewed at the same time.

- 3.14 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have not been met, they will inform the Head Teacher/ Chief Education Officer (as appropriate)/that a re-job sizing of the post is not required at this time.
- 3.15 If the Job Sizing Co-ordinators fail to agree the outcome of a review, the matter will be referred to the LNCT joint secretaries.
- 3.16 At the end of the review or re-job sizing process (if required), a Record of Review will be completed and agreed by the Job Sizing Co-ordinators and the Depute Chief Executive, Education, People and Business.
- 3.17 All documentation will be stored in the relevant job sizing file.
- 3.18 The Job Evaluation Team will inform the Head Teacher/Chief Education Officer—(as appropriate) formally of the outcome of the review/re- job sizing of the post.
- 3.19 A copy of relevant documentation will be forwarded to:
- Resource Planning for preparation of advert
  - School Support Co-ordinators/Managers for actioning through Payroll (if salary change)
  - HR Service Support
  - Corporate Finance for information
- 3.20 A teacher who is acting up temporarily into a promoted post, which is the substantive post of another teacher eg covering a maternity leave, secondment etc, should be paid as per acting up arrangements at the same job sized salary of the substantive postholder.
- 3.20.1 There is no requirement to review the job size of a post prior to an acting up period where the post is held on a substantive basis by another teacher.
- 3.20.2 A teacher who is acting up into a post, which is held on a substantive basis by another teacher, cannot request a review of job size.
- 3.20.3 A teacher who is acting up into a promoted post should not assume any personal conservation of salary which the substantive postholder may hold.
- 3.20.4 If the job size of a post is reviewed, and subsequently re-job sized at a higher salary point, at the instigation of the authority or by the substantive post holder during any acting up period, the teacher who is acting up will be paid as per acting up arrangements at the new job sized salary for the post . This will take effect from the stated date of implementation of the new job size.
- 3.20.5 If the job size of a post is reviewed, and subsequently re-job sized at a lower salary point, at the instigation of the authority or by the substantive post holder during any acting up period, the teacher who is acting up will be paid as per acting up arrangements at the new job sized salary for the post. This with take effect from the stated date of implementation of the new job size.

- 3.20.6 In the case of paragraph 3.20.5, the substantive post holder is entitled to a three year cash conservation as per national arrangements. Conservation arrangements do not apply to the teacher who is acting up.
- 3.21 A teacher who is acting up temporarily into a promoted post, which is vacant and pending advert, should be paid as per acting up arrangements at the same job sized salary of the previous substantive postholder. Any change to the job size as a result of the review process will be effective from the start date of the new postholder.

#### **4.0 Reviewing the Job Size of a Promoted Post at the Request of the Postholder**

- 4.1 Where a promoted postholder believes that there have been significant changes to the whole school data and/or the responsibilities of the post (as permitted by the LNCT agreed Role Profile for the post) since the last job sizing of the post, he/she should in the first instance consult the SNCT Job Sizing Review Criteria. (See **Appendix 1** of this paper : SNCT Review Criteria)
- 4.2 **All** changes to the post, both increases and decreases in whole school data and/or post responsibilities will be taken into account when considering the SNCT Review Criteria.
- 4.3 Changes to whole school data and post responsibilities are graded - Type A, Type B and Type C – depending on the likely effect they will have on the overall score for a post.  
One type A change automatically initiates a re-job sizing of the post.  
Two type B or one type B and two type C changes are required to initiate a re-job sizing.  
Four type C changes are required to initiate a re-job sizing.
- 4.4 Some changes apply only to certain posts. This is based on whether or not the particular section of the questionnaire impacts on the size of that type of post.
- 4.5 If the SNCT Review Criteria indicate that a re-job sizing of the post may be necessary, the postholder should discuss this, in the first instance, with the Head Teacher/ Chief Education Officer (as appropriate).
- 4.6 If the Head Teacher/Chief Education Officer (as appropriate) agrees that a re-job sizing of the post may be necessary, then he/she should inform the Job Evaluation Team of their intention to request a review.
- 4.7 There are two points in the year when Applications for Review from postholders are considered - December and June. The closing date for December applications is the last Friday in November. The closing date for June applications is the last Friday in May. If an application is received outwith these times, it will be held until the next scheduled diet of reviews.
- 4.8 Under normal circumstances, a post will only be reviewed once in any twelve month period.
- 4.9 The Job Evaluation Team will collate the whole school data and seek information on the responsibilities of the post from the postholder and Head Teacher or the Chief Education Officer (in the case of a Head Teacher post). A proforma is available for collating this information.

- 4.10 The Job Evaluation Team will complete the Application for Review with the whole school data and the responsibilities of the post, relating to the last job sizing of the post. The current whole school data and the current responsibilities of the post, as provided by the postholder, will also be added.
- 4.11 The completed Application for Review will be sent to the postholder and Head Teacher/Chief Education Officer (as appropriate)/ for checking and agreement.
- 4.12 Advice on interpretation of terms is available from the Job Sizing Co-ordinators.
- 4.13 The completed and agreed Application for Review should be forwarded to the Job Evaluation Team.
- 4.14 A Job Sizing Questionnaire should **not** be completed and submitted at this time.
- 4.15 The Job Sizing Co-ordinators will consider the Application for Review against the SNCT Review Criteria. (See **Appendix 1** of this paper : SNCT Review Criteria)
- 4.16 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have been met, they will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate)/that a re-job sizing of the post is required (see **SECTION 6** of this paper).
- 4.17 Consideration will be given to whether changes to the whole school data and/or responsibilities of the post could have a possible impact on the job size of any other promoted post(s) in the school, which may as a result require to be reviewed at the same time.
- 4.18 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have not been met, they will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate)/that a re-job sizing of the post is not required at this time.
- 4.19 If the Job Sizing Co-ordinators fail to agree the outcome of a review, the matter will be referred to the LNCT joint secretaries.
- 4.20 At the end of the review or re-job sizing process (if required), a Record of Review-will be completed and agreed by the Job Sizing Co-ordinators and the Depute Chief Executive, Education, People and Business.
- 4.21 All documentation will be stored in the relevant job sizing file.
- 4.22 The Job Evaluation Team-will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate) formally of the outcome of the review/re-jobsizing of the post.
- 4.23 A copy of relevant documentation will be forwarded to:
- Resource Planning
  - School Support Co-ordinators/Managers for information or actioning through Payroll (if salary change)
  - HR Service Support
  - Corporate Finance for information

## **5.0 Reviewing the Job Size of a Promoted Post initiated by the Authority**

- 5.1 The authority may initiate a review of the job size of any existing promoted post/posts if it believes that there have been substantial changes to the whole school data and/or the responsibilities of the post(s) as indicated by the SNCT Review Criteria. (See **Appendix 1** of this paper : SNCT Review Criteria)
- 5.2 Changes to whole school data and post responsibilities are graded are graded - Type A, Type B and Type C – depending on the likely effect they will have on the overall score for a post.
- One type A change automatically initiates a re-job sizing of the post.
  - Two type B or one type B and two type C changes are required to initiate a re-job sizing.
  - Four type C changes are required to initiate a re-job sizing.
- 5.3 Some changes only apply to certain posts. This is based on whether or not the particular section of the questionnaire impacts on the size of that type of post.
- 5.4 The authority can review the job size of any post at any time during the school session. Under normal circumstances, a post will be reviewed only once in any twelve month period.
- 5.5 The Depute Chief Executive, Education, People and Business or nominated officer would discuss the reasons for the review, the planned timescale and the practical details of the exercise initially with the Head Teacher and the Teacher Trade Union representatives and thereafter with the postholder(s).
- 5.6 The Job Evaluation Team will collate the whole school data and seek information on the responsibilities of the post from the postholder and Head Teacher or the Chief Education Officer (in the case of a Head Teacher post). A proforma is available for collating this information.
- 5.7 The Job Evaluation Team will complete the Application for Review with the whole school data and the responsibilities of the post, relating to the last job sizing of the post. The current whole school data and the current responsibilities of the post, as provided by the postholder, will also be added.
- 5.8 The completed Application for Review will be sent to the postholder and Head Teacher/ Chief Education Officer (as appropriate)/ for checking and agreement.
- 5.9 Advice on interpretation of terms is available from the Job Sizing Co-ordinators.
- 5.10 The completed and agreed Application for Review should be forwarded to the Job Evaluation Team.
- 5.11 A Job Sizing Questionnaire should **not** be completed and submitted at this time.
- 5.12 The Job Sizing Co-ordinators will consider the Application for Review against the SNCT Review Criteria. (See **Appendix 1** of this paper : SNCT Review Criteria)

- 5.13 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have been met, they will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate)/that a re-job sizing of the post is required (see **SECTION 6** of this paper).
- 5.14 Consideration will be given to whether changes to the whole school data and/or responsibilities of the post could have a possible impact on the job size of any other promoted post(s) in the school, which may as a result require to be reviewed at the same time.
- 5.15 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have not been met, they will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate)/that a re-job sizing of the post is not required at this time and the job size and salary point of the post remains unchanged.
- 5.16 If the Job Sizing Co-ordinators fail to agree the outcome of a review, the matter will be referred to the LNCT joint secretaries.
- 5.17 At the end of the review or re-job sizing process (if required), a Record of Review-will be completed and agreed by the Job Sizing Co-ordinators and the Depute Chief Executive, Education, People and Business.
- 5.18 All documentation will be stored in the relevant job sizing file.
- 5.19 The Job Evaluation Team-will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate) formally of the outcome of the review/re-jobsizing of the post.
- 5.20 A copy of relevant documentation will be forwarded to:
- Resource Planning
  - School Support Co-ordinators/Managers for information or actioning through Payroll (if salary change)
  - HR Service Support
  - Corporate Finance for information

## **6.0 Procedure for Re - Job Sizing a Promoted Post**

- 6.1 If the Job Sizing Co-ordinators agree that the SNCT Review Criteria have been met and a post qualifies to be re-job sized, the postholder/ Head Teacher /Chief Education Officer (as appropriate), will be asked to complete and sign a new Job Sizing Questionnaire . (See **Appendix 2** of this paper : SNCT Job Sizing Questionnaire)
- 6.2 The information already captured in the Application for Review will assist with the completion of the Questionnaire.
- 6.3 Section 1 of the Questionnaire requires details of whole school data including the school roll, staffing numbers, free meal registrations, budget and school transport numbers. This information will already be entered in the Questionnaire by the Job Evaluation Team.
- 6.4 Sections 2-5 of the Questionnaire capture information specific to the remit of the post within the context of the LNCT agreed Role Profile relating to:
- Management and Strategic Direction of Staff

- Curriculum Development and Quality Assurance
- Implementation of Whole School Policy
- Working with Partners

- 6.5 Any responsibility which is part of a remit for 2 years, or longer, should be included in the job sizing of a post.
- 6.6 The same questionnaire is used for all grades of promoted post. Not every post scores in every section.
- 6.7 The Job Sizing Questionnaire should be completed by the postholder in consultation with the Head Teacher/ Chief Education Officer (as appropriate) in accordance with the Notes for Guidance (See **Appendix 3** of this paper : SNCT Notes of Guidance) and with reference to the appropriate Role Profile as agreed through LNCT.
- 6.8 Advice on interpretation of terms and/or assistance with completion of the Questionnaire is available from the Job Sizing Co-ordinators.
- 6.9 Once completed, the postholder and Head Teacher/ Chief Education Officer (as appropriate) should confirm agreement of the Job Sizing Questionnaire and forward it to the Job Evaluation Team.
- 6.10 The Job Sizing Co-ordinators will validate entries in the Questionnaire and ensure that there has been no double counting of responsibilities.
- 6.11 If a Questionnaire cannot be validated, the Job Sizing Co-ordinators will explain the reasons for non validation and give advice to the postholder, Head Teacher/ Chief Education Officer (as appropriate) prior to possible re-submission of the Questionnaire.
- 6.12 Once validated, the Job Sizing Co-ordinators will confirm agreement of the Questionnaire. The entries in the Questionnaire can now be processed through the Job Sizing Toolkit.
- 6.13 There are five possible outcomes of a re-job sizing exercise.
- 6.13.1 There may be no change to the job size score, no change to the salary point and no change to the salary.
- 6.13.2 There may be an increase in the job size score, but since the score is still within the same salary point, there will be no change to the salary
- 6.13.3 There may be an increase in the job size score, an increase in salary point and an increase in salary.
- 6.13.4 There may be a decrease in the job size score, but since the score is still within the same salary point, there will be no change to the salary.
- 6.13.5 There may be a decrease in the job size score, a decrease in salary point and a decrease in salary.

- 6.14 At the end of the re-job sizing process, a Record of Review-will be completed by the Job Sizing Co-ordinators and the Depute Chief Executive, Education, People and Business.
- 6.15 All documentation will be stored in the relevant job sizing file.
- 6.16 The Job Evaluation Team-will inform the postholder and Head Teacher/ Chief Education Officer (as appropriate) formally of the outcome of the re-jobsizing of the post.
- 6.17 A copy of relevant documentation will be forwarded to:
- Resource Planning
  - School Support Co-ordinators/Managers for actioning through Payroll (if salary change)
  - HR Service Support
  - Corporate Finance for information
- 6.18 Any change to salary resulting from a December review and subsequent re-job sizing will be effective from 01 February of the following year. Any change to salary resulting from a June review and subsequent re-job sizing will be effective from 01 August of the same year.
- 6.19 National arrangements for conservation of salary apply.

## **7.0 Appeals**

- 7.1 There is no mechanism to appeal the outcome of the job-sizing of a post.
- 7.2 If a post-holder believes that the process set out in this Procedure Manual has not been followed correctly, he/she should inform the Job Evaluation Team, in writing or by email, within ten working days of receipt of the outcome of the job sizing exercise.
- 7.3 The Job Evaluation Team will refer the matter to the LNCT joint secretaries for consideration and possible resolution.
- 7.4 If the LNCT joint secretaries fail to agree on matters presented to them, they will refer the matter to the SNCT joint secretaries for guidance and resolution.  
The SNCT Appeals Procedure is detailed in the SNCH Handbook of Conditions of Service, Part 2, Appendix 2.14

**APPENDIX 1**

**JOB SIZING REVIEW CRITERIA**  
(SNCT Handbook : Part 2: Appendix 2.3, Annex A)

Question <i>as set out in the job sizing questionnaire</i>	Change in responsibilities <i>either increases or decreases</i>	Type of change	Posts affected
<b>1. WHOLE SCHOOL/POST HOLDER INFORMATION</b>			
1.4. Type of post	Change(s) to the allocation of responsibilities for formally deputising for the Headteacher amongst DHTs in the school.	A	DHTs
	Change(s) in number of schools in which Headteacher posts have responsibilities.	A	HT
	Change(s) in number of schools in which other posts have responsibilities.	B	DHT/PT
1.9. Type of establishment	The addition or removal of an Additional Support for Learning Unit/ Classes or the addition or removal of a Nursery Unit/Classes	A	HT
1.10. School Roll <i>(using the most recent census data submitted)</i>	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- 100 pupils, <b>or</b> +/- 10% of the school roll on which the last job sizing was based;</li> </ul> which leads to a change in the school roll band.	A	All
1.11. Numbers of staff	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- 10 FTE staff, <b>or</b> +/- 15% of the numbers of FTE staff on which the last job sizing was based.</li> </ul>	B	HT/DHT
1.12. % of children registered for free school meals	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- 10% of the total numbers of pupils in the school;</li> </ul> which leads to a change in the free school meals band.	B	All
1.13. Size of school budget	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- £100,000, <b>or</b> +/- 20% of the actual budget for which the HT is responsible, excluding permanent staff costs and amounts related to property management, on which the last job sizing was based;</li> </ul> which leads to a change in the budget band.	B	HT
1.14. Physical nature of school	Becoming or ceasing to be a multi-site school	B	HT/DHT
	Change(s) consisting of +/- 100 pupils transported into school	C	HT/DHT

Question <i>as set out in the job sizing questionnaire</i>	Change in responsibilities <i>either increases or decreases</i>	Type of change	Posts affected
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2. RESPONSIBILITY FOR THE LEADERSHIP, GOOD MANAGEMENT AND STRATEGIC DIRECTION OF COLLEAGUES			
2.1. Direct line management responsibility for teaching staff	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- 3 FTE teaching staff;</li> </ul> which leads to a change in the teaching staff FTE band.	A	DHT/PT
2.2. Direct line management responsibility for other staff	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- 3 FTE other staff;</li> </ul> which leads to a change in the band in the other staff FTE.	A	DHT/PT
2.3. Accountability for budgets	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- £5,000, <b>or</b> +/- 20% of the regular annual budget on which the last job sizing was based;</li> </ul> which leads to a change in the budget band.	B	DHT/PT
2.4. Responsibility for health and safety	Change(s) in responsibilities which leads to fewer or additional entries being made for this question in the job sizing questionnaire.	C	All

3. RESPONSIBILITY FOR CURRICULUM DEVELOPMENT AND QUALITY ASSURANCE			
3.1. To review the CPD needs, career development and performance of colleagues	None required – covered by 2.1 and 2.2 above.	None	DHT/PT
3.2. To produce <b>and</b> implement the school development plan	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT
3.3. To develop the curriculum and monitor learning and teaching	Change(s) consisting of: <ul style="list-style-type: none"> <li>• +/- 5 classes.</li> <li>• +/- 1 subject, <b>or</b> +/- 2 NQs</li> </ul>	B C	All All
3.4. Other formal curricular / management responsibilities	The addition or removal of whole school responsibility for learning/behavioural support.  The addition or removal of any other responsibility listed in question 3.4	A B	DHT/PT DHT/PT
3.5. Timetabled teaching time per week	+/- 10 hours  +/- 5 hours	B C	All All

Question <i>as set out in the job sizing questionnaire</i>	Change in responsibilities <i>either increases or decreases</i>	Type of change	Posts affected
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4. RESPONSIBILITY FOR WHOLE SCHOOL POLICY AND IMPLEMENTATION			
4.1. To develop, manage and implement a policy on pupil behaviour management	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT
4.2. To develop, manage and implement a policy on guidance, pupil support, pastoral care and pupil welfare	Change(s) in responsibilities for guidance, pupil support, pastoral care or pupil welfare leading to fewer or additional entries being made for this question.  Change(s) to formal responsibility consisting of +/- 25 pupils in the guidance/pupil support/pastoral care caseload which leads to a change of: <ul style="list-style-type: none"> <li>• 2 bands</li> <li>• 1 band</li> </ul>	C  B C	DHT/PT  DHT/PT DHT/PT
4.3. To develop, manage and implement a policy on pupil assessment	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT

5. RESPONSIBILITY FOR WORKING WITH PARTNERS			
5.1. To work with parents	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT
5.2. To lead or work with colleagues in the same establishment	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT
5.3. To work with other establishments and agencies	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT

**JOB SIZING QUESTIONNAIRE**  
SNCT Handbook: Part 2: Appendix 2.2, Annex A

**THIS FORM IS FOR REFERENCE ONLY.**

**Please refer to the 'Job Sizing Notes of Guidance and Examples' when completing this questionnaire.**

**SECTION 1: WHOLE SCHOOL INFORMATION**

Questions 1.1 to 1.7 should be completed for all posts.

1.1 Name of Council

--

1.2 Names of Job Sizing  
Co-ordinators

	(Management)
	(Teacher Union)

1.3 Name(s) of School(s)/Service

--

1.4 Type of Post

Please tick the box which applies.

Headteacher (HT)	
Depute Headteacher (DHT)	
Principal Teacher (PT)	

- Please tick any box which applies and provide information where requested.

The responsibilities of the post relate to more than one school	
Enter the number of schools	

The post is a part time post	
Enter the number of contracted hours worked per week (35 hours equals full time)	

- Please tick any box which applies and provide information where requested.

The post is an established part of the Senior Management Team (SMT)	
The post is the only post with responsibility for formal deputising for the HT (ie the formal depute)	
The post is part of a SMT that does not include a formal depute	
If the SMT does not include a formal depute, enter the number of established SMT posts in the school (excluding the HT)	

1.5 Title of Post

1.6 Name of post holder  
(Resizing applications only)

1.7 Gender of post holder  
(Resizing applications only)

Male

Female

**Questions 1.8 to 1.14, pages 3 to 5, must be completed by the job sizing co-ordinators. Post holders must not complete these questions.**

1.8 Payroll Reference Number (If required)

1.9 Type of Establishment

Please tick to indicate the type of establishment in which the post is located. If other is ticked, give details

Primary	<input type="checkbox"/>	
Secondary	<input type="checkbox"/>	
Special	<input type="checkbox"/>	
Nursery	<input type="checkbox"/>	
Other (give details)	<input type="checkbox"/>	

- Please tick to indicate if the school includes either/both of the following.

Nursery unit or classes (except in a Nursery School)	<input type="checkbox"/>
Additional Support for Learning (ASfL) unit or classes (except in a Special School)	<input type="checkbox"/>

**1.10 School Roll**

Please tick to indicate the school roll.

Up to 50	<input type="checkbox"/>
51 to 100	<input type="checkbox"/>
101 to 250	<input type="checkbox"/>
251 to 500	<input type="checkbox"/>
501 to 750	<input type="checkbox"/>
751 to 1,000	<input type="checkbox"/>
1,001 to 1,250	<input type="checkbox"/>
1,251 to 1,500	<input type="checkbox"/>
Over 1,500	<input type="checkbox"/>

Enter actual school roll

**1.11 Numbers of staff**

Please state the authorised Full Time Equivalent of staff in each category.

Promoted teaching staff	
Other teaching staff	
Other staff	

**1.12 Percentage of children registered for free school meals**

Please tick to indicate the percentage of children registered for free school meals.

0% to 10%	
11% to 25%	
26% to 50%	
51% to 75%	
76% to 100%	

Enter actual percentage

 %

**1.13 Size of school budget**

Please state the size of the total budget for the school	£ <input type="text"/>
--	------------------------

Please tick to indicate the actual budget for which the HT is responsible, excluding permanent staff costs and amounts related to property management.

None	
Up to £100,000	
£100,001 to £250,000	
£250,001 to £500,000	
£500,001 to £750,000	
Over £750,000	

Enter actual amount

 £

**1.14 Physical nature of the school**

Please tick to indicate the number of pupils for whom transport is provided for which the HT has responsibility.

Up to 100	
101 – 200	
201 – 300	
301 – 400	
401 – 500	
Over 500	

Enter actual number of pupils

- Please tick this box if the school is a multi-site school

## SECTION 2: RESPONSIBILITY FOR THE LEADERSHIP, GOOD MANAGEMENT AND STRATEGIC DIRECTION OF COLLEAGUES

Questions 2.1 to 2.3 should be completed for DHT and PT posts only.

### 2.1 Direct line management responsibility for teaching staff

- Tick the relevant box in the left column below for the total number of teaching staff for whom the post has line management responsibility.
- Tick the relevant box in the right column for the total FTE of staff to reflect any part time staff or those staff who are line managed by the post on a pro rata basis.

	Total Number of Teaching Staff	FTE
None	<input type="checkbox"/>	<input type="checkbox"/>
1	<input type="checkbox"/>	<input type="checkbox"/>
2 to 5	<input type="checkbox"/>	<input type="checkbox"/>
6 to 10	<input type="checkbox"/>	<input type="checkbox"/>
11 to 25	<input type="checkbox"/>	<input type="checkbox"/>
26 to 50	<input type="checkbox"/>	<input type="checkbox"/>
Over 50	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"><li>• Enter actual FTE</li></ul>	<input type="checkbox"/>

**2.2 Direct line management responsibility for other staff**

- Tick the relevant box in the left column below for the total number of support staff for whom the post has line management responsibility.
- Tick the relevant box in the right column for the total FTE to reflect any part time staff or those staff who are line managed on a pro rata basis.

	Total Number of Staff	FTE
None	<input type="checkbox"/>	<input type="checkbox"/>
1	<input type="checkbox"/>	<input type="checkbox"/>
2 to 10	<input type="checkbox"/>	<input type="checkbox"/>
11 to 25	<input type="checkbox"/>	<input type="checkbox"/>
Over 25	<input type="checkbox"/>	<input type="checkbox"/>
	• Enter actual FTE	<input style="width: 80px; height: 30px;" type="text"/>

**2.3 Accountability for budgets**

- *Tick the relevant box for the amount of regular annual budget for which the post is accountable.*

None	<input type="checkbox"/>	
Up to £1,000	<input type="checkbox"/>	
£1,001 to £5,000	<input type="checkbox"/>	
£5,001 to £10,000	<input type="checkbox"/>	
£10,001 to £25,000	<input type="checkbox"/>	
Over £25,000	<input type="checkbox"/>	
	• Enter actual budget	<input style="width: 150px; height: 25px;" type="text" value="£"/>

## 2.4 Responsibility for health and safety

This question applies to all posts. HTs may tick the 4<sup>th</sup> box but only where the HT post has responsibility as the school's Health and Safety Officer.

- Tick the relevant box below for the curricular area or category for which the post has overall health and safety responsibility:

Direct curricular responsibility for Craft, Design and Technology;  
Physical Education (including outdoor activities); Chemistry; Physics;  
Biology; Home Economics or Art and Design

Other direct curricular responsibilities

Year groups and / or specialist sections of the school

The whole school (ie school's Health and Safety Officer or equivalent)

## SECTION 3: RESPONSIBILITY FOR CURRICULUM DEVELOPMENT AND QUALITY ASSURANCE

### 3.1 To review the CPD needs, career development and performance of colleagues

A score is automatically awarded for this responsibility based on the entries made in questions 2.1 and 2.2. There is no need to enter any further data.

### 3.2 To produce and implement the school improvement plan and responsibility for whole school policies

This question should be completed for DHT and PT posts only.

Please tick as many boxes as apply and add details in the text box below.

Responsible for writing and leading some or all of a curricular, departmental, subject or faculty improvement plan each year	<input type="checkbox"/>
Responsible for writing and leading some or all of an improvement plan relating to pupil guidance, pupil support or pupil welfare each year	<input type="checkbox"/>
Responsible for writing and leading some or all of an improvement plan relating to specified stages, year groups, other specified groups of pupils, or other specific responsibilities each year	<input type="checkbox"/>
Responsible for writing and leading the whole-school improvement plan, and/or sole responsibility for specified whole school policies each year, whether or not under review in the improvement plan	<input type="checkbox"/>
DETAILS:	

**3.3 To develop the curriculum and monitor learning and teaching**

This question applies to all posts.

No details of curricular areas or national qualifications are required for Early Years and Primary sectors. **Note:** The total number of classes entered across all promoted post holders in a school must not exceed the number of classes in the school.

Please enter number of classes:

Stage or Year Group	Number of Timetabled Classes
Nursery	
P1	
P2	
P3	
P4	
P5	
P6	
P7	

Please enter numbers and text below as required:

	Names of Subjects	Number of Subjects	Level of National Qualification (NQ)	Number of NQs	Number of Timetabled Classes
S1					
S2					
S3					
S4					
S5					
S6					

### 3.4 Other formal management responsibilities

This question should be completed for DHT and PT posts only.

- Please tick as many boxes as apply and add details in the text box below.

Responsible for the whole school timetable in a Secondary school	
Responsible for ICT strategy for the whole school	
Responsible for pre-5 / nursery classes in a Primary school	
Responsible for learning and/or behavioural support	
Responsible for an ASfL unit, class or group for which no other promoted post holder is responsible	
Responsible for other identifiable whole school groups of pupils for which no other promoted post holder is responsible	
Head of the Primary section of a combined school	
DETAILS:	

### 3.5 Timetabled teaching time

This question applies to all posts.

Please enter, to the nearest hour, the weekly timetabled class teaching commitment which is undertaken as a requirement of the post.

Teaching time	hours
---------------	-------

**SECTION 4: RESPONSIBILITY FOR WHOLE SCHOOL POLICY AND IMPLEMENTATION**

All questions in this section may be completed for DHT and PT posts only. For a PT post with curricular responsibility only complete question 4.3 but do not complete questions 4.1 and 4.2.

**4.1 To develop, manage and implement a policy on pupil behaviour management**

- Please tick to indicate the specific responsibilities of this post in relation to pupil behaviour management and provide details below.

Responsibilities for behaviour management relating to specified stages or year group(s) or specialist section(s)	
Responsibilities for behaviour management policy relating to the whole school	
DETAILS:	

**4.2 To develop, manage and implement a policy on guidance, pupil support, pastoral care and pupil welfare**

- Please tick to indicate the specific responsibilities of this post in relation to guidance, pupil support, pastoral care and pupil welfare and give details below.

Formal guidance, pupil support, pastoral care responsibilities with an identified caseload (Secondary schools only)	
Responsibilities relating to the guidance, pupil support, pastoral care and pupil welfare of a year group and/or a specialist section(s) of the school	
Responsibility for specified whole school policies on guidance, pupil support, pastoral care and pupil welfare	
DETAILS:	

**Formal guidance/pupil support/pastoral care responsibilities with a caseload (Secondary schools only)**

Please note that, for those posts with a formal guidance/pupil support/pastoral care role, the caseload indicated below will also be used to capture the guidance, pupil support and pastoral care responsibilities covered in other sections of this questionnaire.

None	
1 to 50	
51 to 100	
101 to 200	
Over 200	

- Enter actual number of pupils in caseload

**4.3 To develop, manage and implement a policy on pupil assessment**

- **Please tick to indicate the specific responsibilities of this post in relation to pupil assessment and give details below.**

Responsible for pupil assessment relating to a subject department or curricular area	
Responsible for pupil assessment relating to a year group or specialist section	
Responsible for pupil assessment policy relating to the whole school	
DETAILS:	

**SECTION 5: RESPONSIBILITY FOR WORKING WITH PARTNERS**

**All questions in this section may be completed for DHT and PT posts only.**

**5.1 To work with parents**

**Please tick as many boxes as apply and add details in the text box below.**

Responsible for remits that involve working with parents on behalf of specified groups of pupils, for example stages, year groups and other identifiable groupings of pupils	
Responsible for remits that involve working with parents on behalf of pupils across the whole school	
DETAILS:	

**5.2 To lead or work with colleagues in the same establishment**

**Please tick as many boxes as apply and add details in the text box below.**

Responsible for remits that involve leading or working with colleagues in the same establishment on behalf of specified groups of pupils, for example stages, year groups and other identifiable groupings of pupils	
Responsible for remits that involve leading or working with colleagues in the same establishment on behalf of pupils across the whole school	
DETAILS:	

**5.3 To work with other establishments and agencies**

**Please tick as many boxes as apply and add details in the text box below.**

Responsible for remits that involve working with other establishments and agencies on behalf of specified groups of pupils, for example stages, year groups and other identifiable groupings of pupils	
Responsible for remits that involve working with other establishments and agencies on behalf of pupils across the whole school	
Responsible for remits that require applying promoted responsibilities in other establishments or agencies	
DETAILS:	

**SIGNATURES**

**Post Holder (Resizing Applications Only)**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**HT/Council Manager**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Job Sizing Co-ordinators**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Management)

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Teacher Union)

**JOB SIZING NOTES OF GUIDANCE AND EXAMPLES\***  
(SNCT Handbook: Part 2: Appendix 2.2, Annex A)

## **INTRODUCTION**

Attached is the SNCT guidance, which must be referred to when completing the Job Sizing Questionnaire. Further Guidance, issued by the SNCT in January 2017 (JS 17/71), has been incorporated into these notes and is marked accordingly.

All responsibilities, which are job sized, must be permanent and contained within the remit of the post.

When the questionnaire is completed, it should be signed by the Job Sizing Co-ordinators, and the line manager for the post. Where there is a current post holder, ie in the case of resizing applications, he/she will also sign the form.

**\* Please note that these are the national job sizing notes. As indicated throughout the notes, local arrangements (eg line management of staff) must be adhered to. In this respect, it is important to consult the EDC locally agreed (LNCT) Role Profile for each post. Further guidance is available from the Job Sizing Co-ordinators.**

**SECTION 1      WHOLE SCHOOL INFORMATION**

**SECTION 2      RESPONSIBILITY FOR THE LEADERSHIP , GOOD MANAGEMENT  
AND STRATEGIC DIRECTION OF COLLEAGUES**

**SECTION 3      RESPONSIBILITY FOR CURRICULUM DEVELOPMENT AND QUALITY  
ASSURANCE**

**SECTION 4      RERSPONSIBILITY FOR WHOLE SCHOOL POLICY AND  
IMPLEMENTATION**

**SECTION 5      RESPONSIBILITY FOR WORKING WITH PARTNERS**

**FURTHER GUIDANCE – GENERAL ISSUES**

## SECTION 1: WHOLE SCHOOL INFORMATION

**The questions in this section of the questionnaire apply to all posts.**

### 1.1 Council

Enter the name of the council in which the post is held.

### 1.2 Names of Job Sizing Co-ordinators

Enter the names of the Job Sizing Co-ordinators responsible for validating and processing the data relating to the post. Job Sizing Co-ordinators are selected from both management and teacher unions and work together, within locally agreed arrangements, to ensure the process is both efficient and fair.

### 1.3 Name of School(s)/Service

Enter the name(s) of the school(s) or Service (eg Sensory Support Service) in which the post is based.

### 1.4 Type of post

Tick the box to indicate the type of post, ie Head Teacher (HT), Depute Head Teacher (DHT) or Principal Teacher (PT).

Tick the box if the post relates to responsibilities in more than one school, and enter the number of schools.

#### **JS/ 17/71 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.

**Examples:**

A HT who is head of two schools would tick the box and enter **2** against the number of schools.

A PT who is responsible for Additional Support for Learning (ASfL) services across a group of six schools would tick the box and enter **6** against the number of schools.

Tick the box if this is a part time post, and enter the number of hours per week the post holder is contracted to work.

A post which is job shared should be treated as a single, full time post.

**JS/17/71 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.

Tick the 1st box if the responsibilities of the post include being a member of the Senior Management Team (SMT). PT post holders should not tick that they are members of the SMT. However, for resizing purposes only a PT may tick this box if he/she had done so in the previous job sizing questionnaire for this post **and** if he/she remains part of the SMT.

Tick the 2nd box if the responsibilities include being the only member of the SMT who formally deputises for the HT.

Tick the 3rd box if the SMT does not include a formal depute and in the 4th box enter the number of SMT posts who share the task of deputising.

**Primary Example:**

*In a school where there is only one DHT post, tick the 1st box indicating that the post holder is a member of the SMT and the 2nd, indicating that he/she is the only member of the SMT who formally deputises for the HT.*

**Secondary Examples:**

*In a school where there are three DHT posts, one of whom is solely responsible for deputising for the HT, all three should tick the 1st box, and the DHT with deputising responsibility should tick the 2nd. No-one should tick the 3rd box or make an entry in the 4th box.*

*In a school where there are four DHT posts, which share responsibility for deputising for the HT, all should tick the 1st box, none should tick the 2nd box, and all should tick the third box and enter **4** in the 4th box to indicate the number of SMT members in the school, excluding the HT.*

## 1.5 Title of post

Enter the title by which the post is known.

### Primary Example:

*In a large school where PTs have responsibilities at different stages, the post may be known as “Principal Teacher, Early Years”.*

### Secondary Examples:

*In a school where traditional subject posts exist, the post may be known as “Principal Teacher of Mathematics”.*

*In a school where PTs are responsible for groups of subjects, a post may be known as “Faculty Head - Science” or similar title.*

*A Principal Teacher with responsibility for the management of the pastoral care of pupils, the post may be known as “Principal Teacher – Pastoral” or “Principal Teacher of Guidance” or “Principal Teacher Guidance/Pupil Support”.*

## 1.6 Name of post holder

Enter the name of the post holder in the case of a resizing application.

If the post is vacant, enter *Vacancy*.

## 1.7 Gender of post holder

Tick the box to indicate the gender of the post holder in the case of a resizing application.

***Questions 1.8 to 1.14, pages 3 to 5, must be completed by the job sizing co-ordinators. Post holders must not complete these questions.***

## 1.8 Payroll Reference Number

Any reference required by the council when processing the results will be entered by the Job Sizing Co-ordinators.

## 1.9 Type of Establishment

Tick the box to indicate the type of school in which the post is located. If the post is in an “other” type of school, describe this in the box provided.

If the post is in a school where there are pupils from 3 – 18, enter the description which is generally used for the establishment.

If the post is in a school (other than a Nursery School) which has a Nursery Unit or classes or in a school (other than a Special School) which has an ASfL unit or classes, tick the appropriate box(es).

**Primary Example:**

*If a Primary school has Nursery class(es), the 1st box should be ticked. If that school also has an ASfL unit, both boxes should be ticked.*

**1.10 School Roll**

Tick the box to show the range into which the number of pupils on the roll falls using the most recent census data submitted.

If the post is vacant and the circumstances in the school will have changed when the appointee takes up post (eg school amalgamations, new nursery classes) the best available estimate should be used.

**JS/ 17/71 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 co-ordinators 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.”

The actual number of nursery pupils rather than the full time equivalent should be used and the number used should be representative of the number of pupils in the nursery throughout the year. For example, a nursery with a morning class of 50 and an afternoon class of 50, 100 should be taken as the representative head count even if the nursery is not operating at fully 50/50 at all times throughout the year.

**JS/ 17/71      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.

The actual school roll should be entered in the box provided. This entry is for reference purposes only.

### **1.11    Numbers of Staff**

Enter the number of staff that make up the authorised staffing allocation for the school on a Full Time Equivalent (FTE) basis. The FTE for teachers is based on a 35 hour week.

In the 1st box, enter the total FTE of HT, DHT and PT post holders in the school.

In the 2nd box, enter the FTE of all other teachers who are managed within the school. Councils should also take due account of their own line management arrangements for teachers who work across schools, eg learning support teams. This could involve sharing the responsibility between the HT and a central line manager.

In the 3rd box, enter the FTE of all staff other than teachers who work in the school and who are directly line managed within the school. FTEs should be calculated based on the number of hours per week that an equivalent full time post would normally be contracted to work. Councils should also take due account of their own line management arrangements for staff who work across schools.

This would normally include office staff, janitors, classroom assistants, early years officers/nursery nurses, auxiliaries etc, who are managed within the school. It would exclude facilities staff or other staff not employed by the Council department responsible for the school or managed by outside agencies, for example, catering and cleaning staff.

### **1.12    Percentage of children registered for free school meals**

Tick the box which indicates the percentage of children registered for free school meals at the most recent date on which this calculation was made.

Where there is universal provision of free school meals for P1 to P3 the percentage registered for P4 to P7 should be used.

The actual percentage should be entered in the box provided. This entry is for reference purposes only.

**JS/17/71 Free School Meals - How should we deal with free meal entitlement?**

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.

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 Co-ordinators should report to the LNCT joint secretaries any implications the use of P4-7 are having.

**JS/ 17/71 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 co-ordinators 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.

**1.13 Size of school budget**

Enter the total budget for the school.

Tick the box which indicates the range into which the total budget for which the HT is accountable falls, taking into account the following parameters:

The following should be *excluded*:

- Salary costs and other employee costs (eg superannuation and national insurance) relating to permanent staff, and staff on fixed term contracts of more than 1 year
- Costs relating to building maintenance work, including repairs, decoration and improvements, unless devolved
- Budgets for capital expenditure
- Special funding from the Scottish Government/Executive or other sources
- Monies collected from parents

The actual budget for which the HT is accountable for should be entered in the box provided. This entry is for reference purposes only.

### **1.14 The physical nature of the school**

Tick the box to indicate the number of pupils for whom transport is provided to school. This should include all pupils with a transport entitlement for which the HT has responsibility for health and safety.

The actual number of pupils should be entered in the box provided. This entry is for reference purposes only.

Tick the next box if the school has classrooms on more than one site; a school is on more than one site if it is necessary to leave school premises to move from one site to another. The box should only be ticked if the HT is responsible for more than one site. Schools that have sports facilities or other specialist facilities on different sites should not be treated as multi-site schools for this purpose.

## **SECTION 2: RESPONSIBILITY FOR THE LEADERSHIP, GOOD MANAGEMENT AND STRATEGIC DIRECTION OF COLLEAGUES**

**Throughout this section HTs receive an automatic score based on the whole school data.**

**All questions in this section should be completed for DHT and PT posts. For HT posts only question 2.4 may be completed.**

### **2.1 Direct line management responsibility for teaching staff**

Please include all teaching staff for whom the post has direct line management responsibility. Line management responsibility means overall responsibility for the work carried out by staff, which may include performance, absence monitoring, discipline, PRD, CPD etc. This does not include management that is limited to supervision of staff in the classroom, or contributing to CPD needs, without having overall responsibility for staff.

Where the line management of staff is shared with another promoted post then the number of staff line managed by the post holder, on a pro rata basis (FTE), should be included. Double counting of staff must be avoided.

Part time staff should be calculated based on the number of hours per week that an equivalent full time post would normally be contracted to work (35 hours for teachers) and entered as a proportion of this time. The same applies to staff who are also line managed by more than one promoted post holder.

If the FTE figure falls between the bands, round to the nearest whole number.

If you do not have any direct line management responsibility for teaching staff then you should enter a tick in the 'none' box in both columns.

Probationers should be counted as full time teaching staff, ie 1.0 FTE.

Visiting music instructors should be included as 'other staff' in question 2.2 below, even though some may possibly be qualified teachers.

Tick the relevant box in the 1st column for the total number of staff, and then tick a box in the 2nd column for actual FTE in order to reflect any part time staff or those staff who are line managed on a pro rata basis.

The actual FTE should be entered in the box provided. This entry is for reference purposes only.

#### **Primary Example:**

*A DHT has responsibility for the infant department where there are 4 classes, 2 of which have job share teachers. Under "Total Number of Teaching Staff" the 6 to 10 box should be ticked (4 job sharers and 2 full time staff) and under "FTE" the 2 to 5 box (4 FTE) should be ticked.*

### **Secondary Examples:**

A science teacher working half the time in the Biology department and half the time in the Chemistry department would be taken as 0.5 FTE by both the PT of Biology and the PT of Chemistry. This is assuming the PTs have overall responsibility for the work carried out by the teacher, which may include performance, absence monitoring, discipline, PRD, CPD etc, when the teacher is working for their department.

If a DHT were responsible for 4 PTs, each of whom is responsible for 3 classroom teachers, the total number of staff for whom the DHT has direct line management responsibility would be 4. Each PT would have direct line management responsibility for 3 staff.

*If a curricular PT has a PT Guidance/Pupil Support working 0.4 FTE in the department as a class teacher and the PT Guidance/Pupil Support also does 0.6 FTE in the Guidance role under the leadership of a DHT, the Department PT would line manage that person for 0.4 FTE and the DHT would line manage that person 0.6 FTE. This is assuming that the DHT and PT have overall responsibility for the work carried out by the PT Guidance/Pupil Support when working for each department.*

### **JS/17/71 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.

## **2.2 To manage other staff**

As for 2.1 above but with respect to support staff for which the post holder has direct line management responsibility. 'Other staff' includes all support staff, for example, pupil support assistants, classroom assistants, auxiliaries, janitors, clerical/administrative staff, etc. Only those staff who are line managed by a promoted post holder in the school and are employed by the council service running the school should be counted.

FTE of support assistants (and other school support staff) should be calculated based on the number of hours per week that an equivalent full time post would normally be contracted to work and entered as a proportion of this time.

Management of learning support staff or classroom assistants or pupil support assistants when they are working in the classroom should not be counted as 'line management' unless there is overall responsibility for managing them.

Posts such as music instructors, technicians and librarians, may be managed partly by a promoted post holder within a school and partly by a centrally-based manager or co-ordinator. Job sizing co-ordinators should be informed of how this sharing operates and the percentages or decimal fractions to be allocated to post holders for this responsibility. Within some councils such arrangements may have been agreed within the LNCT, where this is not the case the LNCT must be notified of the arrangements for shared management.

**JS/17/71 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 co-ordinators 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.

Only when the total FTE figure falls between the bands, should the FTE be rounded up to the nearest whole number.

Tick the relevant box in the 1st column for the total number of other staff, and then tick a box in the 2nd column for actual FTE in order to reflect any part time staff or those staff who are line managed on a pro-rata basis.

The actual FTE should be entered in the box provided. This entry is for reference purposes only.

**Primary Examples:**

A DHT in a Primary school has responsibility for 1 violin instructor and 2 guitar instructors working in the school for 7 hours each per week, total number of hours is 21/0.6 FTE. This figure may be allocated proportionately, depending on the arrangements operating within the council, as they may or may not be line managed by someone else within the council. For example, if a person from the council has 60% line management responsibility for Music Instructors then 40% of the FTE of the time worked in the school may be allocated to the DHT. Therefore, under “Total Number of Staff” column, the 2 to 10 box should be ticked (3 people) and under “FTE” the 2nd box should be ticked (0.6 FTE @ 40% = 0.24 FTE, rounded to the nearest whole number = 1). This example may also apply in the Secondary sector. A PT has responsibility for 1 Clerical Assistant (35 hours) and 5 Support Assistants (25 hours/0.71 FTE each). Under “Total Number of Staff” the 2 to 10 box should be ticked (6 staff) and under “FTE” the 2 to 10 box (4.55 FTE).

**Secondary Examples:**

PT Science has 3 Technicians working in the department. The PT shares equally the responsibility for line management of them with a council manager on a basis of 40% managed by the PT Science and 60% managed by the council manager. Therefore, under the “Total Number of Staff” column the 2 to 10 box should be ticked (3 people) and under “FTE” the 2 to 10 box should be ticked (3 FTE @ 40% = 1.2 FTE, which is rounded up to 2 FTE as it falls between bandings). Where a council manager has full line management responsibility for Technicians, the ‘None’ box should be ticked.

A PT Pupil Guidance/Pupil Support has responsibility for 7 Support Assistants (25 hours/0.71 FTE each). Under “Total Number of Staff” the 2 to 10 box should be ticked (7 staff) and under “FTE” the 2 to 10 box (4.97 FTE) should be ticked.

*A DHT is responsible for 2 Music Instructors with a combined FTE of 0.4 in the school, and also for a full time Clerical Assistant working 35 hours (1.0 FTE). There are 3 members of staff so under the “Total Number of Staff” column the 2 to 10 box should be ticked. The FTE of the 3 staff is 1.4. This falls between the 1 option and the 2 to 10 option. Under “FTE the 2 to 10 box should be ticked. Rounding up only applies if the total FTE that is calculated falls between options or bandings.*

**Note: All FTEs in examples are based on a 35 hour week.**

### **2.3 Accountability for budgets**

Tick the relevant box for the amount of regular annual budget for which the post is accountable.

HTs are accountable for the whole school budget and the HT may delegate parts of this budget to other promoted post holders. It is not possible for more than one other promoted post holder to be responsible for the same monies.

Budgets for capital expenditure or special one-off funding from the Scottish Government or other sources should not be included. Monies collected from parents and other special funding arrangements should also be excluded.

#### **JS/17/71 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.

The actual budget should be entered in the box provided. This entry is for reference purposes only.

#### **Primary Example:**

The HT may delegate some budget to DHT or PT post holders, eg for the year groups / curricular areas that they manage. In a small school, the DHT may be given responsibility for some or all subject-related budgets.

#### **Secondary Example:**

*The HT may delegate some budget to a DHT, eg for ICT or CPD. HT may also delegate some budget to PTs to make them accountable for the budgets for their respective departments / subjects.*

## **2.4 Responsibility for health and safety**

**All promoted post holders have responsibility for health and safety and a base score has already been awarded for this from the information provided in Section 1.**

Tick the 1st box if the post has **direct curricular** responsibility for any of the subjects listed. This will most likely be the subject PT post, but it could be a DHT post in a smaller school or PT post in a Primary school. This box cannot be ticked for a HT post.

Tick the 2nd box if the post has other **direct curricular** responsibilities for health and safety, ie PT posts for subjects not listed at the 1st box. PT posts with whole school responsibility for a subject will tick one of the first two boxes. This box cannot be ticked for a HT post.

Tick the 3rd box if the post has health and safety responsibilities for year groups and / or specialist sections of the school. This box cannot be ticked for a HT post.

Tick the 4th box if the post has overall responsibility for health and safety for the whole school. If the HT post has responsibility as the school's Health & Safety Officer, and this responsibility has not been delegated to another promoted post, then this box should be ticked. This is the only box that can be ticked for HT posts. This box can only apply to one promoted post in the school.

### **Primary Examples:**

A DHT / PT in a Primary school with curricular responsibility for environmental studies would have direct curricular responsibility for health and safety for that subject and would enter a tick in the 2nd box.

A DHT or PT post holder who is head of P1 and P2 in a Primary school would enter a tick in the 3rd box as being responsible for health and safety for these year groups.

### **Secondary Examples:**

For a PT Biology post the 1st box may be ticked.

For a PT English post the 2nd box may be ticked.

For a DHT post with health and safety responsibilities for S3 and S4 the 3rd box may be ticked.

## SECTION 3: RESPONSIBILITY FOR CURRICULUM DEVELOPMENT AND QUALITY ASSURANCE

### 3.1 To review the CPD needs, career development and performance of colleagues

There is no need to enter any information for this item as a score will be calculated automatically based on the number of staff directly line managed by this post and entered in 2.1 and 2.2. Other responsibility for CPD (eg, a school's CPD Co-ordinator) should be recorded in 5.2.

### 3.2 To produce and implement the school improvement plan and responsibility for whole school policies

**This question is for DHT and PT posts only. For HT posts, this responsibility is scored automatically based on whole school data.**

You can make an entry in this question if you have sole responsibility to produce and lead the implementation of an improvement plan or a section of one, and also if you have sole responsibility for producing, leading and reviewing certain whole school policies, whether or not they are under review in the improvement plan (4th box).

Tick the box/boxes to indicate the area on which the plan will have impact. More than one tick is possible, depending on the remit for the post.

Give details of the specific responsibilities in relation to this post in the text box.

#### **Example:**

For a DHT post in any sector with sole responsibility for pastoral care and also for the production of the whole plan, tick the 2nd and 4th boxes. If the DHT post is also in charge of certain whole school policies, then this is already covered by the tick placed in the 4th box.

#### **Primary Example:**

*For a DHT post with sole responsibility for the curricular areas of maths across all stages and also for the entire curriculum of P6 and P7, tick the 1st box and the 3rd box.*

#### **Secondary Examples:**

*For a science faculty PT post solely responsible for the improvement plan in biology, chemistry, physics and science, tick the 1st box.*

*For a PT or DHT post with sole responsibility for an improvement plan for support for learning, tick the 3rd box.*

*For a PT Guidance/Pupil Support post with sole responsibility for a section of the improvement plan dealing with an aspect of pupil support, tick the 2nd box. If, in addition, the PT has sole responsibility to develop, lead and review the whole school policy on health, then the 4th box should also be ticked.*

### 3.3 To develop the curriculum and monitor learning and teaching

**This question may be answered for HT, DHT or PT posts, provided the post has direct responsibility for the curriculum of the classes shown and for monitoring learning and teaching in these classes.**

For PT Support for Learning the number of timetabled classes box must not be completed, instead an entry should be made in question 3.4 in the 5th box. However, entries may be made for subjects and qualifications, see example in final paragraph of notes on 3.3

#### Primary

*Enter the number of timetabled classes for which the post has direct responsibility.*

*There is no facility to enter subjects or qualifications, only the number of classes. Some classes may be composite. If this is so, decimals should be used to show the proportion at each stage. Some posts may be responsible for the entire curriculum at certain stages. However, other posts may be responsible for a curricular area for all or some stages. In such cases, decimals should be used to reflect the proportion of the curriculum involved. In all cases, including the use of decimals, the total across all promoted posts must be equal to the number of classes in the school.*

*In Pre-5 a morning group is treated as 1 class, and an afternoon group also as 1 class. For a nursery with both a morning and afternoon group, enter 2 classes.*

#### Primary Examples:

*For a PT post responsible for the entire curriculum of P1-3 in a school with 2 x P1 classes, a P2 class, P2/3 composite (one third P2 and two thirds P3), and a P3 class, enter P1 – 2, P2 – 1.3, P3 – 1.7 (total 5 classes).*

*A DHT responsible for language and expressive arts across all stages in a school where language is reckoned to account for 25% of the curriculum and expressive arts for 15%, is in charge of 40% of the curriculum. The total shown should amount to 0.4 of the total number of classes in the school, spread appropriately over all stages and being the equivalent of 0.4 per class.*

*In a school with a class structure of 2 x P1, 1 x P2, 1 x P2/3 (half P2, half P3), 2 x P3, P4, P5, 1 x P6 and 1 x P7, the entries should be: P1 – 0.8, P2 – 0.6 (0.4 for the straight P2 plus 0.2 for half of the P2/3), P3 – 1.0 (0.4 for each straight P3 plus 0.2 for half of the P2/3), P4 – 0.8, P5 – 0.8, P6 – 0.4, P7 – 0.4. The total is 4.8. It can be checked by taking 0.4 of the school's total of 12 classes (=4.8).*

**SNCT 17/71 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.

## **Secondary**

The curriculum is likely to be directly managed by PTs, and only rarely by DHTs or HTs. Entries should be made under 5 headings; Names of Subjects; Number of Subjects; Level of National Qualification; Number of National Qualifications (NQs) and Number of timetabled classes.

## **Subjects**

A subject is a separate, recognisable course of study. It may be made up of individual units or topics, but these individual parts are not themselves considered subjects. If in doubt, reference can be made to the SQA catalogue (or similar publication) of national courses, national certificates and standard grades. Courses not included in the SQA catalogue may also be counted, eg ASDAN, Duke of Edinburgh etc, as long as they are timetabled within the school day.

Certain subjects in S1 and possibly S2, for example science and technical, should be considered to be 1 subject, even if they comprise units from different parts of the curricular area. After that, the number of subjects may be counted separately.

Some subjects, for example, RME and PE, have a general course (for all pupils) as well as specialist courses beyond S1/2. Even so, they should be considered to be offering only 1 subject for each year group.

Give the names of the subjects and the number of subjects taught in each year group. Count S5 and S6 together if these pupils are timetabled together. For example, if 3 subjects are taught to mixed classes of S5 and S6, then record 3 subjects against either S5 or S6, but not both. Use decimals to show shared responsibility. For example, if responsibility for an S1/2 course in science is shared equally amongst a PT Biology, a PT Chemistry and a PT Physics, then show this as 0.33 under number of subjects, along with the number of classes.

## **National Qualifications (NQs)**

Only national courses (collections of units), national certificates and standard grades count in this column. Individual units do not. Each level should be counted only once and placed against the year group with the biggest presentation.

Give the name of each national course, certificate or standard grade and a total number at each stage, counting each level only once. Access 1, Access 2, Access 3, Standard Grade (not subdivided into F, G and C), Intermediate 1, Intermediate 2, Higher and Advanced Higher are all recognised levels.

**SNCT 17/71      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

SCQF	New National Qualification	Replaces 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	Standard Grade (Credit) Intermediate 2
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.

### **Timetabled classes**

Enter the number of separately identifiable class groups appearing on the school or departmental timetable in each year. In a school with 8 classes in S1 taking 3 subjects within the same faculty, the entry would be 8, not 24. This is because the same group of pupils takes all 3 subjects. After subject choices have been made, the pupil groupings are likely to be different for the 3 subjects and should be counted separately.

Responsibility for some classes may be shared. For example, 3 PTs may share a science course in S1. The number to be entered in this column will depend on how the sharing is done. If 12 classes are organised on a rotational basis attending Biology for 3 months, Chemistry for 3 months and Physics for 3 months, then the entry would be 4 (with a corresponding entry of 1 in the subject column) as the subject is taught to 4 classes at any one time. However, if the classes are following an integrated science course with no rotation involved and each PT is responsible for one third of the course, then the entry would be 12 but the subject column would only show 0.33.

Mixed classes of S5 and S6 are common. Simply count the total number of classes across S5 and S6 in the curricular areas concerned. They can be divided between S5 and S6 if so desired without affecting the score.

### **Secondary Examples:**

*A PT of RME post is responsible for: S1 - 7 classes; S2 - 8 classes; S3 - 8 core RE classes and 2 Standard Grade classes; S4 - 7 core RE classes and 2 Standard Grade classes; S5/6 - 1 Higher class and 1 Intermediate 2 class. This would be entered as:*

*S1 – subjects 1 / national qualifications 0 / classes 7 (1/0/7)*

*S2 – 1/0/8*

*S3 – 1/0/10*

*S4 – 1/1/9*

*S5 – 1/2/2*

*S6 – 0/0/0 (included in S5 figures)*

*The subject names and NQ levels names should also be entered in the appropriate columns.*

*A PT post covering both Biology and Chemistry has the following responsibilities:*

*S1 - shared responsibility with another PT for an integrated science course for 12 classes;*

*S2 – shared responsibility with another PT for an integrated science course for 12 classes;*

*S3 - 3 biology and 2 chemistry classes, with both subjects offered at Standard Grade and Int1;*

*S4 - 4 biology and 3 chemistry classes, with both subjects being offered at Standard Grade and Int1;*

*S5/6 – 2 mixed S5/6 classes in H biology, 1 mixed S5/6 class in Int2 biology, and 1 mixed S5/6 class in Int1 biology, plus in chemistry 1 mixed S5/6 classes at Higher and 1 mixed S5/6 composite Int1/Int2 class;*

*S6 - 1 class in either Advanced Higher Biology or Chemistry.*

*This information would be recorded as:*

*S1 – subjects 0.5 / national qualifications 0 / classes 12 (0.5/0/12)  
S2 – 0.5/0/12  
S3 – 2/0/5  
S4 – 2/4/7  
S5 – 2/4/6  
S6 – 1/1/1*

*The subject names and NQ levels names should also be entered in the appropriate columns.*

*A school timetables the 3 social subjects in S1 and S2 on a rotational basis. Each social subject has its own PT. There are 9 classes in S1 and in S2. In each year group, the PT History post has responsibility for 3 classes at any one time for one third of the school year. The numerical entries to be made in the table for S1 and for S2 would be:*

*Subjects 1 / NQs 0 / Classes 3.*

*In a school there are 10 PT Guidance/Pupil Support and each contributes a 4 week unit (10% of the course) to the PSHE course for each year group. There are 10 classes in each of S1 to S5/6 (combined). In the number of subjects column 1 should be entered, for S1 to S5, and in the number of timetabled classes column, for S1 to S5, 1 class should be entered, representing 10% of the total number of classes in each year group.*

*If a PT Support for Learning has sole responsibility for the curricular materials and quality of learning and teaching for a separately timetabled group of pupils in S1 to S4 leading to presentation for English at Access 1 and Access 2 then a 1 should be entered in the subject column for both S3 and S4 (where the responsibility for the subject is not shared with a PT English) and a 2 should be entered in the national qualifications column either against S3 or S4 (but not both). No entry should be made in column for number of timetabled classes. The class responsibility is covered in question 3.4 and the box “Responsible for an ASfL unit, class or group for which no other promoted postholder is responsible” should be ticked.*

### **3.4 Other formal management responsibilities**

**This question is only for DHT and PT posts. It is likely to apply mostly to DHT posts.**

A list of formal management responsibilities is given, mostly on a whole school basis. Any boxes applying to a post should be ticked if the post carries sole responsibility for the area described. In other words, for each responsibility given, only one post can receive credit for it. The only exception is the item on learning and behaviour support where two posts may be credited, one for learning support and the other for behaviour support. It is possible that no boxes will be ticked in this section, particularly for PT posts.

Give details of the specific responsibilities in relation to this post in the text box.

**Primary Example:**

*A DHT post has responsibility for a group of pupils for whom English is not their first language. For this post the box “Responsible for other identifiable whole school groups of pupils for which no other promoted post holder is responsible” should be ticked.*

**Secondary Example:**

*A DHT post has responsibility for the attainment of “at risk” pupils in the lowest 20% attainment band. For this post the box “Responsible for other identifiable whole school groups of pupils for which no other promoted post holder is responsible” should be ticked.*

### **3.5 Timetabled teaching time**

**This question may be answered for HT, DHT and PT posts.**

Enter, to the nearest hour, the weekly timetabled class teaching commitment which is undertaken as a requirement of the post.

A PT Support for Learning may be in class supporting pupils for 18 hours a week and it would be appropriate to enter this.

Teaching blocks or periods should be converted into hours. In many cases, the actual class commitment will vary year to year. A typical or average figure should be entered if this is the case.

A post which is held on a job share basis should include the combined class teaching commitment of both job share post holders.

HTs should not make an entry here if the staffing standard of the school does not compel them to be class teachers but they choose to do some teaching.

**JS/17/71 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 co-ordinators 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.

## **SECTION 4: RESPONSIBILITY FOR WHOLE SCHOOL POLICY AND IMPLEMENTATION**

All promoted posts have a responsibility for whole school policy and its implementation. All posts are awarded a base score for this which is calculated from the whole school data.

**All questions in this section may be completed for DHT and PT posts only.**

### **4.1 To develop, manage and implement a policy on pupil behaviour management**

This question should be completed for a DHT or PT post with specific responsibility for the behaviour management of the whole school or for a year group or specialist section of the school. It should not be completed for PT posts with only curricular responsibility. For posts of PT Guidance/Pupil Support this question will not normally be completed except where there are specific whole school responsibilities in the remit for the post.

#### **Examples:**

For a DHT or PT post with responsibility for the whole school pupil behaviour management policy and disciplinary procedures, the 2nd box should be ticked.

For a DHT post with responsibility for behaviour management of a specific stage, year group or section of the school, the 1st box should be ticked.

For a PT post with specific responsibilities for behaviour management of pupils within a specialist section of the school or year group, the 1st box should be ticked but not if the responsibilities are exclusively curricular.

Give details of the specific responsibilities in relation to this post in the text box.

### **4.2 To develop, manage and implement a policy on guidance, pupil support, pastoral care and pupil welfare**

This question should be completed for a DHT post with responsibility for developing, managing and implementing specified whole school policies in this area, or in relation to a year group or section of the school.

This question should be completed for a PT post with responsibility for a formal guidance/pastoral caseload or for policies related to pastoral care and pupil welfare for a specialist section of the school.

The “formal guidance” caseload is applicable only to Secondary guidance/pupil support/pastoral posts.

The guidance caseload box cannot be ticked for a DHT post if already counted for a PT post in the same school.

This section should **not** be completed for PT subject /curriculum posts.

Give details of the specific responsibilities in relation to this post in the text box.

The actual number of pupils in the caseload should be entered in the box provided. This entry is for reference purposes only.

**Example:**

For a DHT post with specific responsibilities for whole school policies in this area, the 3rd box should be ticked.

**Secondary Examples:**

*For a formal PT Guidance/Pupil Support/Pastoral post, the 1st box should be ticked.*

*For a PT Support for Learning (or Additional Support Needs) post which carries with it full guidance and pastoral care responsibilities for specific pupils, the 1st box should be ticked.*

*For a DHT or PT post with specific responsibilities in this area for a year group or specialist section of the school, the 2nd box should be ticked.*

### **4.3 To develop, manage and implement a policy on pupil assessment**

This question should be completed for a DHT post with whole school responsibilities for pupil assessment or a DHT or PT post with responsibilities for pupil assessment within a department or curricular area or in relation to a year group or specialist section of the school.

Give details of the specific responsibilities in relation to this post in the text box.

**Examples:**

For a PT Subject/Curriculum post with lead responsibilities for pupil assessment within a subject department or specific curricular area, the 1st box should be ticked.

For a DHT or PT post with lead responsibilities for assessment for a year group, stage or specialist section of the school, the 2nd box should be ticked.

For a DHT post with SQA Co-ordinator responsibilities (Secondary), the 3rd box should be ticked.

## SECTION 5: RESPONSIBILITY FOR WORKING WITH PARTNERS

All promoted posts have a responsibility for working with partners. All posts are awarded a base score for this which is calculated from the whole school data.

**All questions in this section may be completed for DHT and PT posts only.**

### 5.1 To work with parents

Only complete this item if the post carries responsibilities not captured by other questions.

Tick the 1st box if the post has sole responsibility for a remit not captured elsewhere that involves working with parents on behalf of groups of pupils, but not across the whole school.

Tick the 2nd box if the post has sole responsibility for a remit not captured elsewhere that involves working with parents across the whole school.

Tick both boxes if some remits involve the parents of groups of pupils, and other remits involve working with parents across the school.

Give details of the specific responsibilities in relation to this post in the text box.

#### Primary Example:

*For a Primary DHT post with responsibility for P4-7, the 1st box should be ticked. This accounts for all contact with parents of P4-7 pupils not covered by other questions. If, in addition, this post has responsibility for working with parents across the whole school, for example, through enterprise activities, then the 2nd box should also be ticked.*

#### Secondary Examples:

*For a DHT post with responsibility for S3 and S4, the 1st box should be ticked. This accounts for all contact with parents of S3 and S4 pupils not covered by other questions. If, in addition, this post has responsibility for working with parents across the whole school, for example, on health issues, then the 2nd box should also be ticked.*

*A PT Pupil Guidance/Pupil Support post carries a responsibility to co-ordinate the issue of careers across the whole school and is required to work with parents on this basis. As this responsibility is not captured by other questions, the 2nd box should be ticked.*

**JS/17/71 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.

## **5.2 To lead or work with colleagues in the same establishment**

Only complete this item if the post carries responsibilities not captured by other questions.

Tick the 1st box if the post has sole responsibility for a remit not captured elsewhere that involves leading or working with colleagues on behalf of groups of pupils, but not across the whole school.

Tick the 2nd box if the post has sole responsibility for a remit not captured elsewhere that involves leading and working with colleagues across the whole school.

Tick both boxes if some remits involve leading and working with colleagues on behalf of groups of pupils, and other remits involve leading and working with colleagues across the school.

Give details of the specific responsibilities in relation to this post in the text box.

### **Example:**

For a PT post in any sector with a remit in raising achievement across the whole school, the 2nd box should be ticked (if responsibility is not captured elsewhere).

### **Primary Examples:**

*For a DHT post which includes the Staff Development Co-ordinator role where the remit is likely to involve working with staff across the whole school, the 2nd box should be ticked.*

*A DHT post with responsibility for literacy across the school is required to lead and work with all staff on this issue would merit a tick in the 2nd box.*

### **Secondary Example:**

*A PT post with a permanent role in leading staff groups for specific purposes (eg workshops) would merit a tick in the 1st box.*

## **5.3 To work with other establishments and agencies**

Only complete this item if the post carries responsibilities not captured by other questions.

Tick the 1st box if the post has sole responsibility for a remit that involves working with other establishments and agencies on behalf of groups of pupils, but not across the whole school.

Tick the 2nd box if the post has sole responsibility for a remit that involves working with other establishments and agencies on behalf of pupils across the whole school.

Tick the 1st and 2nd boxes if some remits involve working with other establishments and agencies on behalf of groups of pupils and if other remits involve working with other establishments and agencies on behalf of pupils across the school.

Tick the 3rd box if the post carries promoted responsibilities that impact on other establishments or agencies.

Give details of the specific responsibilities in relation to this post in the text box.

**Primary Example:**

*For a DHT post with responsibility for Primary – Secondary transfer, tick the 1st box.*

**Secondary Examples:**

*For a PT post responsible for Education for Work in all year groups, tick the 2nd box.*

*A PT Guidance/Pupil Support post has responsibility for health issues across the school and is required to liaise with a range of health agencies, tick the 2nd box.*

*For a DHT given responsibility to co-ordinate support for learning across the whole Council, tick the 3rd box as the responsibility for the service applies within the other establishments.*

## **Further General Guidance : JS/17/71**

**Q           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

**Q           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 co-ordinators 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.

**Q           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 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.

**Q 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.

**Q 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.

**Q What should happen if Job Sizing Co-ordinators 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.

**APPENDIX 4**

**Job Size Score Allocation to Salary Spines**  
**(SNCT Handbook of Conditions of Service, Part 2, Appendix 1)**

**Principal Teacher Spine**

<b>JOB SIZE POINT</b>	<b>Job Size Band</b>
1	0-82
2	83-96
3	97-110
4	111-126
5	127-142
6	143-159
7	160-177
8	178-196

**Depute and Head Teacher Spine**

<b>JOB SIZE POINT</b>	<b>Job Size Band</b>
1	0-128
2	129-142
3	143-157
4	158-174
5	175-191
6	192-205
7	206-220
8	221-235
9	236-250
10	251-266
11	267-291
12	292-317
13	318-342
14	343-368
15	369-406
16	407-444
17	445-483
18	484-521
19	522+

