

**PERTH AND KINROSS COUNCIL**

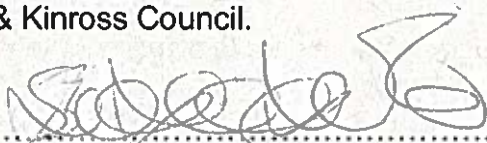
**JOINT NEGOTIATING COMMITTEE FOR TEACHING STAFF**

**LOCAL AGREEMENT**

**“Job Sizing Procedure”**

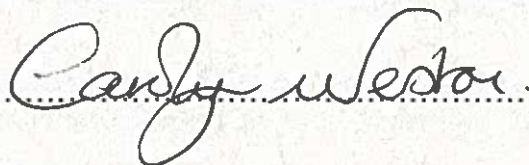
In terms of the Local Recognition and Procedure Agreement, it is accepted by all signatories acting on behalf of the Council and the recognised unions that this agreement is a binding local agreement effective from 18 September 2018. This supersedes relevant provisions within the National Agreement and constitutes a formal amendment to the terms and conditions of employment for teaching employees within Perth & Kinross Council.

Sheena Devlin (Executive Director of Education & Children’s Services), on behalf of Perth & Kinross Council.



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Carolyn Weston, on behalf of the Teachers’ Trade Unions



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# JOB SIZING PROCEDURE

## 1. INTRODUCTION

- 1.1 Job Sizing is an analytical means of determining the size of promoted posts held by Headteacher's, Depute Headteacher's and Principal Teachers.
- 1.2 Background information about each post is collected using the agreed Scottish Negotiating Committee for Teachers (SNCT) Job Sizing Questionnaire within four key areas:
  - Responsibility for leadership, good management and strategic direction of colleagues
  - Responsibility for curriculum development and quality assurance
  - Responsibility for whole school policy implementation
  - Responsibility for working with partners
- 1.3 In addition, whole school information is also used. Whole school data consists of the school roll, numbers of staff, percentage of pupils **registered** for free school meals, size of the school budget and the number of pupils for who dedicated school transport is provided.
- 1.4 A weighting is given to each piece of information collected and resultant data is aggregated to calculate the "size" of the job. Promoted post holders in schools are placed on the appropriate salary point, as determined by the Job Sizing process.
- 1.5 This procedure sets out Perth & Kinross Council's approach to ensuring consistency in the Job Sizing of new promoted posts and the re-Job Sizing of existing posts, as per the SNCT Handbook.
- 1.6 All responsibilities must be permanent and contained within the relevant job remits. Any responsibility which is part of a remit for **less than 2 years** will be excluded for Job Sizing purposes.
- 1.7 Over time there may be significant changes to whole school data and/or responsibilities which may necessitate a Job Sizing review to ensure that a post is still job sized appropriately with the commensurate salary.
- 1.8 Changes to whole school information, responsibilities or both may result in a review of a post being assessed against the SNCT's review criteria. If the criteria are met, the post will be subject to re-Job Sizing. If the criteria are not met, then the review is complete and there will be no change to the recorded Job Sizing outcome for a post.



1.9 The Job-Sizing of a promoted post will be considered in the following circumstances.

1. When a new post is being established or an existing post becomes vacant;
2. When a post holder requests a review of their post in the belief that aspects of the whole school information and/or the responsibilities of a post have changed;
3. A Council initiated review as part of a rolling planned programme, as outlined in section 6;
4. When the Headteacher is considering introducing or re-structuring a departmental faculty (secondary only).
5. When a new school is established within the authority.

1.10 The role of the Job Sizing Co-ordinators is to work together to ensure that the Job Sizing paperwork provided by the Headteacher is efficient, fair and transparent. They are tasked to:

1. Provide advice and guidance on the completion of the Job Sizing Questionnaire;
2. Validate and sign off the questionnaire when satisfied that the details provided is an accurate reflection of the role;
3. Process all data through the toolkit;
4. Provide written confirmation of the outcome to the Head of Service/Headteacher (points 3 and 4 is the sole responsibility of the management side Co-ordinator).

## **2. JOB SIZING CO-ORDINATORS**

2.1 Job Sizing Co-ordinators must have received training either directly by the SNCT trainers or locally by other trained Job Sizing Co-ordinators identified for that purpose.

2.2 Two Job Sizing Co-ordinators (one management and one teachers' side) will be involved in all Job Sizing/reviews.

2.3 Job Sizing Co-ordinators will meet as required in order to process requests without undue delay.

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:

- (a) Consider applications for review and using the SNCT review criteria decide whether a re-Job Sizing is necessary;
- (b) Provide advice and guidance on the completion of the relevant documents;

- (c) Validate and sign off the Questionnaire when satisfied that the details provided is an accurate reflection of the role;
- (d) Process all data through the Toolkit;
- (e) Provide written confirmation of the outcome to the post-holder/Head Teacher

2.5 It is the responsibility of both sides to have a pool of trained Job Sizing Co-ordinators.

### **3. JOB SIZING A NEW POST**

3.1 When a new post is to be established the Headteacher should have an initial discussion with their QIO to discuss the role and potential impact on other posts. It will be the responsibility of the Headteacher, in consultation with Human Resources to draft a job profile if there is not one already approved for the post. New job profiles will require JNCT or agreed sub group approval prior to advertisement.

3.2 The Headteacher should complete a questionnaire along with supporting documents and arrange to meet with the management Job Sizing Co-ordinator.

### **4. REVIEWING A VACANCY**

4.1 When it is known that an existing post is to become vacant, the Headteacher must arrange to complete the Job Sizing Questionnaire prior to submitting the vacancy justification form. This will enable a review of the post to take place. Such a review will be undertaken prior to a post being advertised. It is therefore essential that the QIO or Human Resources are notified of the impending vacancy as soon as possible i.e. on receipt of resignation letter or verbal confirmation of resignation. The post will not normally be advertised until Job Sizing has taken place. Where a Headteacher's post becomes vacant the QIO should arrange to complete the Job Sizing Questionnaire.

4.2 **All** promoted vacancies must be job sized unless it has been re-sized within the previous twelve months. Headteacher's should use SNCT agreed generic job profiles when advertising promoted posts.

### **5. POST HOLDER REQUEST FOR REVIEW**

5.1 The SNCT has determined that requests from individual post holders may be submitted for review in June and December of each year. Requests for a review must be submitted no later than 31 May for June review or 30 November for December review. If an application is received out-with these times, it will be held until the next scheduled diet of reviews.



- 5.2 Where a post holder believes there have been significant changes to the whole school data and/or the responsibilities of the post since the last Job Sizing of the post, he/she should in the first instance refer to the SNCT's review criteria. Where the post holder is a Headteacher they should make their QIO aware of their request for re-Job Sizing.
- 5.3 All changes in whole school data and/or post responsibilities must be accounted for when considering the SNCT's review criteria. Consideration should also 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 also be required to be reviewed at the same time.
- 5.4 If, when assessing the changes against the review criteria, it is thought that the criteria has been met the post holder should complete a Job Sizing Questionnaire. The completed questionnaire will be agreed by both the employee and the Headteacher or, in the case of a Headteacher post, by the relevant QIO.

## **6. COUNCIL INITIATED REVIEW**

- 6.1 The Council may initiate a review of one or more promoted posts if there is an indication of a change to the whole school data and/or the responsibilities of a post where there is a likelihood of the review resulting in a change to the job size score.
- 6.2 An annual desktop exercise will be undertaken by Human Resources during the staffing exercise in January each year to determine whether there has been a category "A" change in the whole school information and/or responsibilities. School roll data will be taken from the previous year's September census and free meals entitlement from the Scottish Government's survey published in June. A report will be prepared by Human Resources for the Head of Service and copied to the union Job Sizing Co-ordinator which will determine all posts that require to be resized.
- 6.3 Any review will be undertaken in partnership with the trade unions and any resulting change to salary will be implemented from the 1 August.

## **7. INTRODUCTION OR RE-STRUCTURE OF A DEPARTMENTAL FACULTY (SECONDARY ONLY)**

- 7.1 Head Teachers should refer to the Modernising Middle Management in Secondary Schools paper (August 2018) and discuss this initially with the Head of Secondary & Inclusion before submitting posts for Job Sizing.

## **8. ESTABLISHMENT OF A NEW SCHOOL**

- 8.1 When appointments are to be made for a new school the whole school information, will be determined using known data for existing schools. Care must be taken to ensure that the data used can be evidenced.
- 8.2 All promoted posts will be sized initially using the estimated whole school data to determine an indicative salary level for each role. Care should be taken to ensure that the data used can be evidenced. The final salary level for each post will be determined when the new school has been established and the first recorded census information is known.
- 8.3 Sizing of posts will be undertaken in partnership between the appropriate Head of Service and with management and trade union side Job Sizing Co-ordinators.
- 8.4 The exercise will be carried out based on comprehensive and up-to-date job profiles for each role, in consultation with the Head of Service with guidance from Human Resources. The job profile will be used to inform the completion of a Job Sizing Questionnaire for the exercise.
- 8.5 When the questionnaire has been finalised and the Co-ordinators have agreed the content the information will be entered into the toolkit to determine the salary level for the post. It is this salary that will be used when recruiting for each role. However, where a teacher is appointed to a promoted post with a view to preparing for the opening of a new school and is to continue to serve in the post after the opening of the school, the salary of the teacher may be increased by such an amount as the Head of Service considers appropriate using a 'felt fair' approach by comparing the school to adjacent schools in the local authority area, in order to attract the correct calibre of candidates to high profile posts. As this is a management decision, trade unions will be notified of any uplift in salary in these circumstances. Post Holders will be advised that the posts will be formally job sized at a time of first recorded census data.
- 8.6 If the formal Job Sizing leads to a change in salary level then following action will be taken:
1. If the role is job-sized with a higher salary than had been anticipated following the initial exercise, the post holder will receive the higher salary from the date of their appointment; or
  2. If the role is job-sized with a lower salary than had been anticipated following the initial exercise, the post holder will be informed that their salary is to be cash conserved from the date of notification of the job-size outcome. Conservation will be in accordance with the SNCT conditions of service.



## **9. PROCEDURE FOR RE-JOB SIZING**

- 9.1 Where it has been agreed by the Job Sizing Co-ordinators that the review criteria have been met the post holder will be asked to complete and sign a Job Sizing Questionnaire.
- 9.2 Section 1 of the Questionnaire will be populated with the whole school information by the management Co-ordinator.
- 9.3 Sections 2-5 of the questionnaire will be completed by the post holder in agreement with their Headteacher, or in the case of a Headteacher post, in agreement with the relevant QIO.
- 9.4 The Headteacher should arrange to meet with the management Co-ordinator to validate the information contained in the questionnaire or alternatively the completed questionnaire should be emailed to [HR@pkc.gov.uk](mailto:HR@pkc.gov.uk).
- 9.5 Both management and union Co-ordinators will meet and validate information contained in the questionnaire and ensure that there has been no double counting of responsibilities, and that it is the role and not the person that is being evaluated.
- 9.6 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 post in the school, which may then require to be reviewed at the same time e.g. where there is more than one DHT in a school it would be necessary to job size both or all DHT posts to ensure no double counting of responsibilities.
- 9.7 Where the Co-ordinators have concerns regarding the completed Questionnaire these will be raised initially with the post holder and/or Headteacher or QIO. The Job Sizing Verification Form, attached as Appendix 1, will be used to validate the information and maintain an audit trail of any amendments to the questionnaire. If these discussions do not resolve the matter, the Job Sizing Co-ordinators shall refer the questionnaire to the relevant QIO for clarification. This may require discussion between the QIO and Headteacher.
- 9.8 Once validated, the Co-ordinators will sign the questionnaire. Only at this point should the entries in the questionnaire be processed using the Job Sizing Toolkit.
- 9.9 The outcome of the Job Sizing should be agreed by the Head of Service. When verifying with the Head of Service consideration will be given to outcomes at similar sized schools and/or comparable posts.
- 9.10 Should the outcome result in a change in salary the management co-ordinator will email the Employment & Payroll Team who will advise the post holder by letter of the outcome.

- 9.11 All paperwork associated with a review will be held in electronic form by Human Resources. A rank order of outcomes will also be held and kept up-to-date by Human Resources.
- 9.12 For individual requests any change to salary resulting from a December review and subsequent re-Job Sizing will be effective from 1 February of the following year. Any change to salary resulting from a June review and subsequent re-Job Sizing will be effective from 1 August of the same year.
- 9.13 Where the Job Sizing results in a lower grade, cash conservation of salary will be applied in accordance with the SNCT conditions of service.

## **10. HARD TO FILL, SHARED HEADSHIP & CAMPUS LEADER POSTS**

- 10.1 In order to attract candidates to 'hard to fill' posts, Heads of Service may use discretion when determining the outcome of these posts and increase the salary by such an amount as the Council considers appropriate using a 'felt fair' approach should the job sizing outcome not reflect an appropriate salary level. Any uplift in salary in these circumstances should be discussed and agreed with the trade unions.
- 10.2 When undertaking Job Sizing for shared headship posts, both posts will be job sized. An additional point will be awarded to the post which attracts the greater outcome in order to recognise the additional demand of managing two schools. Where an existing employee is asked to cover a shared headship and the outcome is detrimental to their current salary level, the Head of Service may use discretion when determining the salary and increase it by such an amount as the Head of Service considers appropriate using a 'felt fair' approach. As this is a management decision trade unions will be notified of any uplift in salary in these circumstances.
- 10.3 When undertaking Job Sizing for Headteacher/Campus Leader posts an additional point will be awarded to the final outcome to take into account the additional responsibilities of the campus role.

## **11. JOB SIZING TIMESCALES**

- 11.1 When a vacancy or new post is to be job-sized a sizing will take place as soon as possible to ensure the vacancy is advertised without undue delay.
- 11.2 Requests for a post to be re-sized by individual Post holders will be resized within the timescales detailed in paragraph 5.1.
- 11.3 An annual timeline for a Council initiated review will be produced by Human Resources and discussed with the relevant Head of Service.



## **12. JOB SIZING APPEAL**

- 12.1 It is recognised that there is potential for disagreement regarding the duties of teachers as described in the questionnaire. These disagreements should be dealt with informally. The only appeals process for job sizing relates to the accuracy or otherwise of the completed Job Sizing Questionnaires.
- 12.2 The outcome of Job Sizing in relation to new posts will not be subject to an appeals process.
- 12.3 Arrangements for appeals against the outcomes of the national Job Sizing exercise are as follows:
1. Post holder's, who have concerns about their job sizing scores, should submit a letter of appeal to the Executive Director (Education & Children's Services).
  2. An independent review of the scores will be undertaken by two alternative Job Sizing Co-ordinators.
  3. The Post Holder will receive a letter outlining the decision of the independent review. Should the post holder still be unsatisfied the decision will be put forward to the Joint Negotiating Committee for Teaching Staff (JNCT) for clarification.

**For further information please contact the HR Services Team (ECS), telephone, 01738 475482 or 01738 475474.**

