

<b>HOW TO COMPLETE YOUR QUESTIONNAIRE</b>	
<b>Who should complete the questionnaire?</b>	<p>The questionnaire should be completed by the following post holders:</p> <ul style="list-style-type: none"> <li>➤ Headteachers “HTs”</li> <li>➤ Depute Headteachers “DHTs”</li> <li>➤ Principal Teachers “PTs”</li> </ul>
<b>Which sections of the questionnaire should I complete?</b>	<p>DHT and PT post holders should complete all sections of the questionnaire where these are applicable to the post held.</p> <p>HT post holders should complete:</p> <ul style="list-style-type: none"> <li>➤ all of Section 1,</li> <li>➤ Question 2.4, (where applicable)</li> <li>➤ and Questions 3.3 and 3.5 (where applicable).</li> </ul> <p>The responsibilities of HTs relating to other parts of the questionnaire are determined by “whole school” information which will be provided by your local authority.</p>
<b>How should I complete my questionnaire?</b>	<p>There are defined terms in the questionnaire and these are indicated by the <b>bold</b> letters. You should read the definitions on page 2 before completing questions that use defined terms.</p> <p>Enter tick boxes like this: <input type="checkbox" value="√"/></p> <p>Enter numbers or text in boxes like this: <input type="text" value="400"/></p> <p>Please ensure you state what your additional responsibilities are where boxes are provided in the questionnaire to do this.</p> <p>You should also study the detailed explanatory notes and examples for each question.</p> <p>Please complete your questionnaire in ink, and <b>NOT</b> in pencil.</p>
<b>What if a question does not apply to my post?</b>	<p>You will find that many of the questions do not apply to the post that you hold. This is because the same questionnaire is used to capture information on all of the promoted post holders in Scottish schools. If a question does not apply to your post leave it blank.</p>
<b>What information will be provided by my local authority?</b>	<p>Information relating to your school will be used for job sizing, and this will be entered by your local authority. The questions that your local authority will need to complete in respect of your school are attached to this questionnaire.</p> <p>The local authority will provide you with a copy of the information that they provide, so you know what information will be used for job sizing.</p>
<b>How do the calculations work?</b>	<p>The detail of the calculations and the weighting system in the toolkit have been agreed by the Scottish Negotiating Committee for Teachers (SNCT) and are confidential.</p>

<b>DEFINITIONS</b>	
The following notes provide definitions of some of the terms that appear regularly in the questionnaire.	
<b>Additional responsibilities</b>	Responsibilities which are additional to those that would be held by someone in your type of post, or by someone who is a permanent member of the senior management team in your school.
<b>Departments / subjects</b>	A section of the school relating to a subject, or to a group of subjects.  For example, the History department, or the Science department.
<b>Direct curricular responsibility</b>	Direct responsibility, as a promoted post holder, for a particular subject area within your school. In a secondary school this will generally be the PT for that subject, but it could be a DHT post holder in a primary school.
<b>Impact</b>	The areas on which a responsibility primarily impacts. For example, the whole school responsibility for SQA liaison impacts on the whole school. The whole school responsibility for maths would impact on the maths department, rather than on the whole school.
<b>Whole school responsibility</b>	These are responsibilities that relate to the whole school, either because no other post holder holds that particular responsibility, or because the responsibility potentially impacts on all pupils in the school.  For example, only one post holder in the school can have whole school responsibility for a subject, or for such responsibilities as ICT or timetabling.
<b>Year groups and / or specialist sections of the school</b>	A year such as P4 or S2, or a section of the school such as a Special Educational Needs section / classes or a Nursery section / classes.

## Job Sizing Explanatory Notes

<b>NOTES AND EXAMPLES</b>	
<b>1. WHOLE SCHOOL INFORMATION</b>	
1.1. Local authority	Enter the local authority in which the post is held.
1.2. Name of job sizing co-ordinator	Enter the name of the person who will be responsible for validating the data relating to the post.
1.3. Name of school	Enter the name of the school in which the post holder works, together with additional information if you have responsibilities in more than one school.
1.4. Type of post	<p>Tick a box for the type of post - i.e. either HT, DHT or PT.</p> <p>Tick the box if your post relates to more than one school and enter the number of schools.</p> <p><b>For example</b>  <i>A PT who is responsible for SEN services across a group of six schools would tick the box and enter 6 against the number of schools.</i></p> <p>Tick the box if this is a part time post and enter the number of hours a week you are contracted to work.</p> <p>Tick the box if the responsibilities of the post you hold includes being a permanent member of the senior management team (“SMT”). Enter X in the next box if the responsibilities include being the only member of the SMT who formally deputises for the Headteacher. If the school does not have a single formal depute, tick the next box and also enter the number of SMT members (excluding the Headteacher) in the school.</p> <p>PT post holders should not generally tick that they are members of the SMT. In the rare circumstances where they do so the salary calculated by the toolkit needs to be checked.</p>
1.5. Title of post	<p>Enter the name by which the post that is to be job sized is known.</p> <p><b>For example</b>  <i>PT of Maths, PT Guidance, PT for Learning Support.</i></p>
1.6. Name of post holder	Enter the name of the post holder, where known.
1.7. Gender	Enter the gender of the post holder if this information is required for monitoring purposes.
<b>2. RESPONSIBILITY FOR THE LEADERSHIP, GOOD MANAGEMENT AND STRATEGIC DIRECTION OF COLLEAGUES</b>	
2.1. Direct line management responsibility for teaching staff	<p>Please include all teaching staff for whom you have direct line management responsibility. Line management responsibility means overall responsibility for the work carried out by staff. This does not include management that is limited to supervision of staff in the classroom, or reviewing CPD needs without overall responsibility for performance.</p> <p><b>For example</b>  <i>Management of learning support staff or classroom assistants in the classroom should not be counted as line management. Learning support assistants would generally be managed by the PT learning support.</i></p>

	<p>You have direct line management responsibility for all of the staff in a department or section of the school which you lead, so long as those staff are not line managed by another promoted post holder.</p> <p><b>For example</b></p> <p><i>If the DHT is responsible for 4 PTs each of whom is responsible for 3 classroom teachers then 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.</i></p> <p>Tick the box for the total number of staff, and also the box for full time equivalents in order to reflect any part time staff.</p> <p><b>For example</b></p> <p><i>A department of 6 Teachers, two of whom work in the school for 2 <sup>1/2</sup> days a week should be taken to be 5 full time equivalent teachers. Under "Number of staff" the 6 to 10 box should be selected and under "Number of full time equivalent staff" the 2 to 5 box should be selected.</i></p> <p>Full time equivalents (FTE) should be calculated based on the numbers of hours per week that an equivalent full time post would normally be contracted to work, and entered as a proportion of this time. Where it is not possible to identify a normal number of contracted hours for the post the calculation should be based on a 35 hour week.</p> <p>If the FTE figure falls between one of the bands round up to the nearest whole number.</p> <p>In cases where it is not clear which teachers have line management responsibility for staff, those staff should be allocated to each PT on a full time equivalent basis.</p> <p><b>For example</b></p> <p><i>A science teacher working for half the time in biology and half in chemistry, would be taken as .5 of a full time equivalent by both the PT of Biology and the PT of Chemistry.</i></p> <p>Probationers should be included as full time teaching staff; i.e. one full time equivalent.</p> <p>Music instructors should be included as other staff in 2.2 below.</p>
2.2. To manage other staff	<p>As for 2.1 above but with respect to non-teaching staff for whom the post holder has direct line management responsibility. Other staff include all non-teaching staff; i.e. classroom assistants, auxiliaries, SEN staff, janitor, office staff, etc.</p>
2.3. Accountability for budgets	<p>Tick the box for the amount of regular annual budget for which you are accountable.</p> <p>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.</p> <p>Budgets for capital expenditure or special one-off funding from the Scottish Executive or other sources should not be included. Monies collected from parents and other special funding arrangements should also be excluded.</p> <p><b>For example</b></p> <p><i>In a primary school parts of the budget may be delegated to DHT post holders, based on the year groups that they manage.</i></p>

	<i>In a secondary school DHTs may have a budget for classroom equipment and / or ICT whilst PTs would generally be accountable for the budgets for their respective departments / subjects. In a small school, the DHT may be responsible for all subject-related budgets.</i>
2.4. Responsibility for health and safety	<p>Tick the first box if your post has <b>direct curricular</b> responsibility for any of the subjects listed. Generally this will be the PT in that subject, but it could be a DHT or PT post holder in a smaller school.</p> <p>Tick the next box if your post has other <b>direct curricular</b> responsibilities for health and safety. PTs with whole school responsibility for a subject will have ticks in one of the first two boxes.</p> <p><b>For example</b>  <i>A DHT in a primary school with curricular responsibility for environmental studies would have an additional direct curricular responsibility for health and safety.</i></p> <p>Tick the next box if your post has health and safety responsibilities for <b>year groups and / or specialist sections of the school</b>.</p> <p><b>For example</b>  <i>A DHT post holder who is head of P1 and P2 in a primary school would tick this box as responsible for health and safety for these year groups.</i></p> <p>Tick the last box if your post has overall responsibility for health and safety for the whole school. Only one promoted post holder in the school may have a tick in this box.</p> <p>HTs are assumed to have whole school responsibility for health and safety, but the first two boxes of this question could be selected by HT post holders if they have <b>direct curricular</b> responsibility for subjects.</p>
<b>3. RESPONSIBILITY FOR CURRICULUM DEVELOPMENT AND QUALITY ASSURANCE</b>	
3.1. To review the CPD needs, career development and performance of colleagues	<p>No information needs to be entered for this item. The job size for CPD needs, career development, and performance of colleagues will be based on the numbers of staff for whom line management responsibilities have been identified in 2.1 and 2.2.</p> <p>Further responsibilities, such as a whole school responsibility for CPD should be captured in the response to 5.2.</p>
3.2. To produce and implement the school development plan	<p>Tick a box if your post has <b>additional</b> responsibility for leading the production and implementation of development plans with impact on any of the areas shown.</p> <p>Some parts of the development plan will impact on the whole school, while others will relate to <b>departments / subjects</b> and other areas of the school.</p> <p><b>For example</b>  <i>A DHT of a primary school who is head of P6 and P7 has an additional responsibility for the production and implementation of the development plan with impact on year groups and / or specialist sections of the school.</i></p> <p><i>Where a PT of Chemistry leads the production and implementation of the development plan for Chemistry this would be an additional responsibility with impact on departments / subjects.</i></p>
3.3. To develop the curriculum and monitor learning and teaching	<p>Enter the number of subjects in each year group for which you have <b>direct curricular</b> responsibility for learning and teaching. In a secondary school subject PTs would generally have <b>direct curricular</b> responsibility for learning and teaching. In a primary school this responsibility is generally with DHTs.</p>

A subject is a separately recognised and identifiable subject, and the Catalogue of National Qualifications (published by the SQA) can be used as a guide in any areas where doubt arises. PSE should not be treated as a subject although formally timetabled PSE classes may be included in the classes column.

Do not enter subjects and classes for which another promoted post holder has direct curricular responsibility. Also do not enter special classes such as support for learning and behaviour, as these responsibilities are captured elsewhere in this questionnaire.

**For example**

*DHT post holders should not include subjects and classes in their year groups for which PTs have direct curricular responsibility.*

Enter the number of national qualifications for which all of the subjects for which you have **direct curricular** responsibility for learning and teaching are taught. National qualifications include Access 1,2 and 3, Standard Grade, Intermediate 1, Intermediate 2, Higher and Advanced Higher. They must be a complete award at a particular level rather than units or groups of units.

Please ensure that the same national qualification level in the same subject is not counted against more than one year group. Count the national qualification against the year group in which the qualification is most commonly taught.

**For example**

*Where there is direct curricular responsibility for Maths at Standard Grade and Intermediate 1 level in both S3 and S4 and there is direct curricular responsibility for Intermediate levels 1 and 2 in S4, this should be entered as 1 national qualification against S3 and 2 national qualifications against S4.*

Also enter the number of classes in which the subject is taught to take account of the extent your responsibility for monitoring learning and teaching.

**For example**

*Where a DHT is responsible for P1 and P2 in a primary school with four classes in each year, 4 should be entered as the numbers of classes in both P1 and P2. No other promoted post holder can claim responsibility for these classes.*

*A PT who is responsible for Maths in S1 to S6 would enter 1 in each of the subject boxes for these year groups. A PT for Modern Languages in a department that includes French, German and Spanish would enter 3 subjects in each year group in which those subjects are taught.*

For composite classes, which cover more than one year group, enter the proportion of pupils from each group against those years, the aggregate of these amounting to one whole class. If several subjects are taught within the one class then this must be treated as a single class.

Morning and afternoon nursery class should be treated as separate classes.

**For example**

*A composite class of 24 pupils half of whom are from P1 and half from P2, should be included as .5 against P1 and .5 against P2.*

*If 3 social subjects are taught to 5 classes the number of classes to be entered should be 5 classes and not as 15 classes.*

Where responsibilities are shared, fractions of subjects, national qualifications or classes may be entered.

	<p><b>For example</b></p> <p><i>If a DHT is responsible for maths and expressive arts for all of P1 to P7, then this should be recorded as 0.35 against each stage (the figure of 0.35 coming from the recommended allocation of 15% of curriculum time for maths in 5-14 documents plus an additional 5% from flexibility, plus 15% for expressive arts, a total of 35% of the curriculum).</i></p> <p><i>Where three PTs share responsibility equally for Science .33 should be recorded under number of subjects for each PT.</i></p>
3.4. Other formal curricular / management responsibilities	<p>The post holder must have a formal <b>whole school</b> responsibility for each of these areas, as delegated by the HT.</p> <p>The <b>whole school</b> responsibility box should be selected if you are responsible for ICT across the school and the box should not be selected if you are only responsible for ICT as a subject.</p> <p><b>For example</b></p> <p><i>A PT of learning support would generally have whole school responsibility for learning support.</i></p> <p><i>A post holder who has formal responsibility for the timetabling of all classes on a whole school basis would have this selected as a formal responsibility under this item.</i></p>
3.5. Timetabled teaching time	<p>Enter the number of hours of formal timetabled teaching time which must be undertaken as part of the responsibilities of the post, rounded to the nearest hour. This should not include time that the post holder teaches to cover for absence or time that the post holder chooses to spend on teaching. When signing off on the forms the HT should confirm that the teaching time is necessary and in the cases where HTs are required to teach this should be specifically confirmed on the sign off at local authority level.</p> <p>Timetabled time for pupil registration classes should be included as teaching time, as should regularly timetabled learning support classes. Please enter the exact numbers of hours and not number of periods, as the length of periods can vary from school to school and authority to authority.</p> <p>If you are a part time post holder, include the actual hours that you teach. This will then be adjusted to calculate the timetabled teaching time you would have on a full time basis.</p> <p>If your teaching time is unusually low at the start of the session because of any temporary arrangements, then your teaching time should be adjusted to what it normally would be.</p> <p><b>For example</b></p> <p><i>A teacher who has formal teaching responsibilities for 20 out of 30 fifty-minute periods would have 16 hours and 40 minutes of formally allocated teaching time per week. Therefore 17 hours should be entered in the box.</i></p>
<b>4. RESPONSIBILITY FOR WHOLE SCHOOL POLICY AND IMPLEMENTATION</b>	
4.1. To develop, manage and implement a policy on pupil behaviour management	<p>All promoted post holders are assumed to have responsibilities for pupil behaviour management. This includes contributing to a whole school policy, applying it within their specific areas of responsibility, and dealing with day-to-day pupil behaviour issues.</p> <p>The boxes should be selected if your post has <b>additional whole school</b> responsibilities with <b>impact</b> on the areas shown.</p> <p><b>For example</b></p> <p><i>A DHT who is responsible for behaviour management as head of S1</i></p>

	<p><i>and S2 year groups would have a leading responsibility with impact on year groups and / or specialist sections of the school.</i></p> <p>If a post holder occasionally deals with behaviour management issues across the school no box should be ticked because this is not a responsibility that is additional to those normally held by the post.</p> <p><i>However a DHT who is responsible for behaviour management and discipline for the whole school would have an additional responsibility for behaviour management with impact on the whole school.</i></p> <p>Boxes should not be ticked for temporary responsibilities such as membership of working groups to deal with particular issues. Also boxes should not be ticked for voluntary activities.</p> <p>If an additional responsibility is ticked, please state what that responsibility is.</p>
<p>4.2. To develop, manage and implement a policy on guidance, pastoral care and pupil welfare</p>	<p>All promoted post holders are assumed to have responsibilities for guidance, pastoral care and pupil welfare. This includes contributing to a whole school policy, applying it within their specific areas of responsibility, and dealing with day-to-day guidance, pastoral care and pupil welfare.</p> <p>The boxes should be ticked if your post has <b>additional whole school</b> responsibilities with <b>impact</b> on the areas shown.</p> <p><b>For example</b></p> <p><i>All Guidance PTs have formal guidance responsibilities with impact on guidance and pastoral care</i></p> <p><i>A DHT who leads the guidance team in a secondary school would have an additional responsibility for guidance with impact on the whole school.</i></p> <p><i>A DHT in a primary school with whole school responsibility for pastoral care will have an additional responsibility in this area with impact on the whole school.</i></p> <p>The question on 'guidance case load' is only applicable for secondary school post holders. Only enter a tick for the caseload for which you are directly responsible.</p> <p>If two teachers share a guidance caseload between them then (for the purpose of completing this questionnaire) they should agree a fair allocation of the caseload so that the same pupils are not counted twice.</p> <p>DHT post holders should not tick a box for guidance caseload if a PT (or another teacher in the school) is directly responsible for that caseload.</p> <p>Responsibilities for pupil welfare that have an impact on <b>departments / subjects</b> are part of the responsibilities that all promoted post holders have, and are not <b>additional</b> responsibilities which require boxes to be ticked in this section.</p> <p>Boxes should not be ticked for temporary responsibilities such as membership of working groups to deal with particular issues. Also boxes should not be ticked for voluntary activities.</p> <p>If additional responsibility is ticked, please state what that responsibility is.</p>
<p>4.3. To develop, manage and implement a policy on pupil assessment</p>	<p>All promoted post holders are assumed to have responsibilities for pupil assessment. This includes contributing to a whole school policy and applying it within their specific areas of responsibility.</p> <p>If the post has responsibilities for assessing pupils as part of teaching responsibilities, rather than as part of a responsibility for leading a</p>

	<p><b>department / subject</b>, this is not an additional responsibility for the purpose of this question. PTs who have <b>direct curricular responsibility</b> for subjects would tick the box with impact on departments/subjects. For PTs of English and Maths this first box must be ticked, even though pupil assessment may apply to all of the pupils in the school.</p> <p>The boxes should be ticked if your post has additional <b>whole school</b> responsibilities with <b>impact</b> on the areas shown.</p> <p><b>For example</b></p> <p><i>A PT of Physical Education would be responsible for assessing pupils with impact on departments / subjects.</i></p> <p><i>A DHT who is head of P6 and P7 would have a leading responsibility for assessing pupils with impact on year groups and / or specialist sections of the school.</i></p> <p><i>A DHT who is responsible for SQA liaison has responsibility for assessing pupils with impact on the whole school.</i></p> <p><i>SQA marking is not an additional responsibility that can be included under this section. It is paid for separately outside of the normal responsibilities of the post.</i></p> <p>Boxes should not be ticked for temporary responsibilities such as membership of working groups to deal with particular issues. Also boxes should not be ticked for voluntary activities.</p> <p>If an additional responsibility is ticked, please state what that responsibility is.</p>
<p><b>5. RESPONSIBILITY FOR WORKING WITH PARTNERS</b></p>	
<p>5.1. To work with parents</p>	<p>All promoted post holders are assumed to have responsibilities for working with parents. This includes contributing to a whole school policy, and applying it within their specific areas of responsibility. If the post has responsibilities for working with parents as part of teaching responsibilities this is not an additional responsibility for the purpose of this question.</p> <p>The boxes should be ticked if your post has additional whole school responsibilities with impact on the areas shown.</p> <p><b>For example</b></p> <p><i>A DHT who is head of P5 and P6 has a responsibility for working with parents with impact on year groups and / or specialist sections of the school.</i></p> <p><i>A DHT who has formal responsibility for managing the introduction of pupils to the school has an additional whole school responsibility for working with parents with impact on the whole school.</i></p> <p>Boxes should not be ticked for temporary responsibilities such as membership of working groups to deal with particular issues. Also boxes should not be ticked for voluntary activities.</p> <p>If an additional responsibility is ticked, please state what that responsibility is.</p>
<p>5.2. To lead or work with colleagues in the same establishment</p>	<p>All promoted post holders are assumed to have formal responsibilities for working with colleagues, with SMT members having greater levels of responsibility. The boxes should only be selected if the post has <b>additional whole school</b> responsibilities with <b>impact</b> on the areas shown.</p> <p><b>For example</b></p> <p><i>A DHT who manages several year groups (e.g. S1 and S2) would have</i></p>

	<p><i>an additional responsibility to work with other year groups with impact on year groups and / or specialist sections of the school.</i></p> <p><i>A DHT who is responsible for co-ordinating and looking after CPD needs throughout the school has an additional responsibility with impact on the whole school.</i></p> <p>Boxes should not be ticked for temporary responsibilities such as membership of working groups to deal with particular issues. Also boxes should not be ticked for voluntary activities.</p> <p><b>For example</b></p> <p><i>The whole school box <b>should not</b> be ticked for chairing a school working party to improve sports facilities because this is a temporary assignment.</i></p> <p>If an additional responsibility is ticked, please state what that responsibility is.</p>
<p>5.3. To work with other establishments and agencies</p>	<p>All promoted post holders are assumed to have formal responsibilities for working with other establishments and agencies.</p> <p>The boxes should be ticked if your post has <b>additional whole school</b> responsibilities for working with other establishments and agencies with <b>impact</b> on the areas shown.</p> <p><b>For example</b></p> <p><i>A DHT who manages P1 year group and manages nursery/ primary liaison would have an additional responsibility for working with other establishments (if the responsibility includes working with nursery schools that are not part of the school in which the DHT works) with impact on the whole school.</i></p> <p><i>A DHT of a secondary school who is head of S1 and is responsible for working with primary schools on the induction of pupils would have an additional responsibility for working with other establishments with impact on the whole school.</i></p> <p><i>A PT who is responsible for Education for Work would have an additional responsibility with impact on the whole school.</i></p> <p>These additional responsibilities <b>do not</b> impact on other establishments or agencies because its primary purpose relates to pupils within the school.</p> <p><i>If a DHT post has time formally allocated to help co-ordinate learning support across the local authority this is an additional responsibility with impact on other establishments or agencies.</i></p> <p>If an additional responsibility is ticked, please state what that responsibility is.</p>