



JNCT 21-01

JOINT NEGOTIATING COMMITTEE FOR TEACHERS

JOB-SIZING

Policy & Procedure

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1.0 INTRODUCTION

- 1.1 Job-sizing is the agreed means by which promoted posts are evaluated for salary purposes in accordance with Teachers' conditions of service. East Ayrshire Council is committed to ensuring that the application of this policy is consistent, transparent and fair; and reflect equality of opportunity with respect to pay. Job-sizing is not intended to address issues related to workload or individual performance, but rather assess the role to which an individual is appointed.
- 1.2 This policy and procedure document defines the principles and process to follow where the size of a post is to be evaluated for the first time, or, in the case of re-sizing, the size is deemed to be no longer appropriate due to permanent measurable qualitative or quantitative changes to the duties and responsibilities to a post or group of posts in a school. Such changes relate to the duties and responsibilities of a post and not to individual work demand or performance.
- 1.3 This policy and procedure document details the process to be followed when posts are to be evaluated and sets out the circumstances when a re-sizing will be initiated. Re-sizing will be undertaken when the requirements detailed in the SNCT handbook have been met (Part 2: Appendix 2.3, Annex A, Review Criteria).

2.0 PRINCIPLES

- 2.1 In addition to the process of 'sizing' a post being fair and transparent, there are five main principles which are applied when job-sizing:
 - **Definition:** Duties and responsibilities must be clearly defined such that they are identifiable and easily distinguishable. These jobs must then be part of the job description.
 - **Sizing:** Job-sizing must be completed for all promoted posts with consistent application across each sector.
 - **Job Understanding:** Job-sizers must understand the job design process. They must understand the various tasks involved.
 - **Concern:** Job-sizing must be concerned with the job and not with the person. i.e. it is the job that must be job-sized and not the postholder.
 - **Evaluate:** Job-sizing must be carried out in accordance with (SNCT) / (JNCT) procedures. All persons who are involved in job-sizing are required to act with integrity in the process particularly in those parts of the process which require judgement.

3.0 FRAMEWORK

- 3.1 Job-sizing forms part of the teachers' conditions of service as agreed by the Scottish Negotiating Committee for Teachers (SNCT). Full account has been taken of SNCT guidance in developing the policy and procedure document.
- 3.2 The SNCT Handbook of Conditions of Service, Part 2, Appendix 2.2 outlines the process of job-sizing. Annex A contains the job-sizing questionnaire and notes for guidance. Annex B contains the job-size score allocation to grades and spinal point. This information is available from the SNCT website www.snct.org.uk The questionnaire and notes for guidance are attached as Appendix 4.
- 3.3 The provisions set out in this policy and procedure document are not intended to replace those of the SNCT handbook.

4.0 EQUALITY STATEMENT

- 4.1 East Ayrshire Council aims to have in place policy documents that meet the diverse needs of our service, population and workforce, ensuring that none are placed at a disadvantage over others. It considers the provisions of the Equality Act 2010 and advances equal opportunities for all. This document has been assessed, in accordance with the Council's policy on undertaking and Equality Impact Assessment, to ensure that no one receives less favourable treatment on the protected characteristics.

5.0 BACKGROUND INFORMATION

- 5.1 The job-sizing process starts with the completion of a questionnaire designed to record the main responsibilities of a post under four headings (sections):
 2. Leadership, Good Management and Strategic Direction of Colleagues;
 3. Responsibility For Curriculum Development and Quality Assurance;
 4. Responsibility For Whole School Policy And Implementation;
 5. Responsibility For Working with Partners

In addition, whole school information, provided by the Council (section 1, of the questionnaire) is used to provide a base score for each post and when taken together through the evaluation process and an output grade is the result.

- 5.2 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 whom dedicated school transport is provided. This information is updated annually following the September census and in June when the School Meals survey and is published by the Scottish Government.

- 5.3 All responsibilities must be permanent and contained within the relevant job description, as agreed through JNCT. Any responsibility which is part of a remit for **less than 2** years will be excluded for job-sizing purposes.
- 5.4 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 sized appropriately with the commensurate salary. The SNCT have agreed the review criteria (Part 2: Appendix 2.3, Annex A, Review Criteria). Appendix 1.
- 5.5 Changes to either whole school information, responsibilities or both will trigger a review of a post being assessed against the SNCT review criteria. If the criteria are met, the post will be subject to re-job-sizing.
- 5.6 The job-size of a promoted post will be reviewed in the following circumstances.
 1. When an existing post becomes vacant and prior to the post being advertised;
 2. When a postholder 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. When the Head of Human Resources believes that aspects of the whole school data and/or the responsibilities of a post/posts merit a review

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. A review of a post may lead to a full re-sizing of the post. With the exception of when a post is being reviewed due to a vacancy the SNCT have agreed set times when re-sizing should be undertaken.

6.0 JOB-SIZING CO-ORDINATORS

- 6.1 Job-sizing co-ordinators must have received training directly by the SNCT trainers identified for that purpose.
- 6.2 The Head of Human Resources will maintain a register of trained job-sizing co-ordinators on both the management and teachers' side. This register will be shared with the SNCT
- 6.3 Two job-sizing co-ordinators (one management and one teachers' side) will be

involved in any one job-sizing/review exercise.

- 6.4 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-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 are an accurate reflection of the role;
 - (d) Process all data through the Toolkit;
 - (e) Provide written confirmation of the outcome to the postholder/head teacher (this will be the responsibility of the management side co-ordinator)
- 6.5 Job-sizing co-ordinators will meet monthly with a schedule of meetings being prepared in June of each year for the following school year. Additional meetings may be arranged as required depending on the volume of work for processing. A record will be kept of all meetings and actions agreed.
- 6.6 In the event that the assigned job-sizing co-ordinators are unable to reach agreement on the content of any claim their concerns will be remitted in the first instance to the monthly job-sizing co-ordinators meeting for consideration. If there continues to be a failure to agree, the advice will be sought informally from the SNCT Joint Secretaries before being considered once again at the monthly job-sizing co-ordinators meeting. If there is no agreement the matter will be referred to the SNCT formally for determination.
- 6.7 Appropriate time will be made available to facilitate job-sizing. Such time will be in accordance with the provision set out in the Facilities Time Framework.

7.0 JOB-SIZING A VACANT POST

- 7.1 When it is known that an existing promoted post is to become vacant, the Head Teacher must inform the Human Resources Officer for their Education Group to enable the job-sizing of the post to take place. Job-sizing will be undertaken prior to a post being advertised. It is therefore essential that Human Resources are notified of the impending vacancy as soon as possible. A post cannot be advertised until job-sizing has been concluded. Reference should be made to Appendix 3 (A).
- 7.2 Only after a post has been job-sized should a RAF (recruitment authorisation form) be submitted for processing. In exceptional circumstances approval may be given by the Head of Human Resources and the Head of Education to meet

the exigencies of the service.

8.0 POSTHOLDER REQUEST FOR REVIEW

- 8.1 Under normal circumstances a post will be reviewed only once in a twelve-month period.
- 8.2 The SNCT has determined that applications may be submitted for review in June and December of each year. Applications for post reviews must be submitted no later than 31st May for June review or 30th November for December review. If an application is received out with these times, it will be held until the next scheduled diet of reviews. Any request must be based on significant and permanent qualitative change(s) to the level of duties and responsibilities of an individual post or group of posts when assessed against the review criteria.
- 8.3 Where a substantive postholder believes that there have been significant changes to the whole school data and/or the responsibilities of the post (as permitted by the JNCT agreed job description for the post) since the last job-sizing of the post, he/she should in the first instance refer to the SNCT review criteria.
- 8.4 All changes in whole school data and/or post responsibilities must be accounted for when considering the review criteria.
- 8.5 Changes 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-sizing of the post; Two type B or one type B and two type C changes are required to initiate a re-sizing. Four type C changes are required to initiate a re-sizing.
- 8.6 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.
- 8.7 If, when assessing the changes against the review criteria, it is thought that the criteria have been met the postholder should discuss this with their Head Teacher. Advice and guidance will be available from the job-sizing co-ordinators. Reference should be made to Appendix 3 (B).
- 8.8 The Head Teacher along with the postholder, should sign and submit a completed post review application form (Appendix 2) to the Human Resources Officer for their Education Group to enable a review of the post to take place. All information must be provided with supporting documents as required before a review can be initiated. A job-sizing questionnaire should not be submitted until the request to review the post has been accepted by the assigned job-sizing co-ordinators.

- 8.9 The job-sizing co-ordinators will consider the post review application and if they agree that the review criteria have been met, they will inform the postholder and Head Teacher that a re-sizing of the post will be undertaken. It is at this time that a completed job-sizing questionnaire must be completed.
- 8.10 Consideration will be given, by the job-sizing co-ordinators, 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 thus require to be reviewed at the same time.
- 8.11 If the job-sizing co-ordinators agree that the review criteria have not been met, the postholder will be informed, and will record their decision on the review paperwork stating clearly their rationale before signing the document.
- 8.12 All paperwork associated with the review will be held in a digital format and linked to the post and the postholder's employment record in CHRIS 21.

9.0 COUNCIL INITIATED REVIEW

- 9.1 The Council may initiate a review of one or more promoted post 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. A Head Teacher can request the Council initiate a review if there is a reallocation of areas of responsibility.
- 9.2 An annual desktop exercise will be undertaken by Human Resources staff during July of each year to determine whether there has been a category "A" change in the whole school data of any school. 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. In circumstances where a category "A" change has occurred a review will be undertaken.
- 9.3 Any review will be undertaken in partnership with the trade unions and a re-sizing exercise will follow the process detailed in section 10 of this document. Each promoted postholder is required to complete a questionnaire.
- 9.4 Any resulting change to salary will be implemented on the 1st February the following year. Cash conservation of salary will be applied in accordance with the prevailing SNCT conditions of service.

10.0 PROCEDURE FOR RE-SIZING

- 10.1 Where it has been agreed by the job-sizing co-ordinators that the review criteria have been met the postholder will be asked to complete and sign a job-sizing

questionnaire supplied by the co-ordinators.

- 10.2 Section 1 of the questionnaire will be populated with the whole school information which will be taken from the review supporting documentation. The whole school information will include: school roll, staffing numbers, free meal registrations, budget and school transport numbers.
- 10.3 Sections 2-5 of the questionnaire will be completed by the postholder in agreement with their Head Teacher, or in the case of a Head Teacher, the Head of Education or nominee. These sections capture information specific to the remit of the post within the context of the JNCT agreed job descriptions relating to: Management and Strategic Direction of Staff; Curriculum Development and Quality Assurance; Implementation of Whole School Policy; Working with Partners.
- 10.4 The completed questionnaire, and current school timetable, should be scanned and emailed to job-sizing@east-ayrshire.gov.uk. A receipt will be provided for each application received. Only questionnaires received in this way will be validated. An Excel Toolkit outcome **will not be accepted**.
- 10.5 The co-ordinators will validate entries in the questionnaire and ensure that there has been no double counting of responsibilities.
- 10.6 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 thus require to be reviewed at the same time.
- 10.7 If a questionnaire cannot be validated, the co-ordinators will provide a rationale to the postholder in writing. The co-ordinators may ask for the questionnaire to be resubmitted with additional supporting documents.
- 10.8 Once validated, the co-ordinators will sign the questionnaire. Only at this point will the entries in the questionnaire be processed using Job-Sizing Toolkit. There are five possible outcomes of a re-sizing exercise:
 - (a) There may be no change to the job-size score, and no change to the salary;
 - (b) There may be an increase in the job-size score, but no change to the salary;
 - (c) There may be an increase in the job-size score, and an increase in salary;
 - (d) There may be a decrease in the job-size score, but no change to the salary;
 - (e) There may be a decrease in the job-size score, and a decrease in salary.
- 10.9 All paperwork associated with a review will be held in a digital format and

linked to the post holder's employment record in CHRIS 21 (Corporate HR information system).

- 10.10 Any change to salary resulting from a December review and subsequent re-sizing will be effective from 1st February of the following year. Any change to salary resulting from a June review and subsequent re-sizing will be effective from 1st August of the same year. Retrospective payments will not be made. Cash conservation of salary will be applied in accordance with the prevailing SNCT conditions of service.

11.0 JOB-SIZING A NEW POST

- 11.1 When, following consultation with staff, a new promoted post is to be established the Head Teacher should have an initial discussion with one of the co-ordinators to discuss the role and potential impact on other posts. It will be the responsibility of the Head Teacher, in consultation with their Education Group Human Resources Officer, to draft a job description if there is no approved description for the post. The JNCT Joint Secretaries will approve the specific duties and job remit.
- 11.2 The Head Teacher should complete a questionnaire along with supporting documents. Reference should be made to Appendix 3 and emailed to job-sizing@east-ayrshire.gov.uk A receipt will be provided. Only a questionnaire received in this way will be validated. An Excel Toolkit outcome **will not be accepted** from a Head Teacher for evaluation.

12.0 TEMPORARY FUNDING AND JOB-SIZING

- 12.1 There may be occasions when authority might be given to the creation of additional promoted posts using external funding streams. For example, Pupil Equity Funds.
- 12.2 When additional promoted posts are being considered there are a number of factors that have to be taken into account:
- (a) The remits assigned to substantive post holders;
 - (b) No management responsibility can be claimed for staff not funded from core budget;
 - (c) Due to the temporary nature of the funding no responsibility for management of a budget can be delegated to a post;
 - (d) There can be no double counting of remit/responsibilities;
 - (e) Unlikely to be a job-sizing claim in sections 2.1-2.4; 3.2-3.4; 4.1-4.3 of the job-sizing questionnaire.

- 12.3 Due to the temporary nature of such posts, no substantive post holder should be disadvantaged.
- 12.4 A remit must be provided by the Head Teacher at the time of submission of the job-sizing questionnaire.
- 12.5 Promoted posts funding using a temporary funding stream will be for a maximum duration of twenty months. It is the responsibility of the Head Teacher to put in place an appropriate plan to manage the transition leading to the discontinuation of the role. This may include the review of the role undertaken by substantive postholders should it be planned to distribute in part or in whole remit of the temporary post to others. Reference should be made section 10.
- 12.6 Any change to the school's core management structure brought about by an increase in promoted posts will require an initial review to be undertaken to establish whether there is an impact on other posts. This might arise in a situation where a decision is taken to subsume the remit of a temporary role and create another permanent position. Reference should be made section 11.

13.0 JOB-SIZING FOR A NEW SCHOOL

- 13.1 When appointments are to be made for a new school the whole school information, for an initial desktop exercise, will be determined using known data for existing schools. Care must be taken to ensure that the data used can be evidenced.
- 13.2 All promoted posts will be sized initially using the estimated whole school data to determine an indicative salary level for each role. Such an approach will be referred to as a desktop exercise with the final salary level for each post being determined when the new school has been established and the first recorded census information is known.
- 13.3 The desktop exercise to size each post will be undertaken in partnership with trade union job-sizers and led by the HR Manager (Economy & Skills), or representative, and follow a similar process to that set out in section 10.
- 13.4 The exercise will be carried out based on a comprehensive and up-to-date job descriptions for each role, in consultation with the Head Teacher (Head of Education in the case of a Head Teacher) with guidance from the Human Resources Officer for the Education Group in which the school will be located, and trade union co-ordinator. The job description will be used to inform the completion of a job-sizing questionnaire for the desktop exercise.
- 13.5 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

anticipated salary level for the post – desktop exercise outcome. It is this salary that will be used when recruiting for each role. Postholders will be advised that the posts will be formally job-sized after the first recorded census data – job-size exercise outcome.

- 13.6 Each role will be job-sized when nationally published data is available for the new school. If job-sizing leads to a change in salary level, from that anticipated because of the desktop exercise, the following action will be taken:
1. If the role has been found to be job-sized with a higher salary than had been anticipated following the desktop exercise, the postholder will receive the higher salary from the date of their appointment; or,
 2. If the role has been found to be job-sized with a lower salary than had been anticipated following the desktop exercise, the postholder 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 prevailing SNCT conditions applicable at the time.

14.0 EDUCATIONAL PSYCHOLOGIST

- 14.1 The SNCT have made provision for job-sizing Principal and Depute Principal Educational Psychology positions.
- 14.2 The questionnaire and explanatory notes are provided in Appendix 5 (SNCT Part 2: Appendix 2.4, Annex A).
- 14.3 Posts will be subject to re-sizing if any change in responsibilities results in a change in the banding in any section of the questionnaire.

15.0 JOB-SIZING TIMESCALES

- 15.1 When a vacancy is to be job-sized it is anticipated that the outcome will be made known no later than four working weeks after the decision has been taken to size the post. Similarly, this time period will apply when a new post is being sized.
- 15.2 Requests for a post to be re-sized in accordance with section 8. The postholder will be notified in writing of the outcome of their application with a copy to their Head Teacher no later than eight working weeks following receipt of their request. Where there is a change to the grade level of the post, any change of salary will be effective in accordance with paragraph 10.10

16.0 JOB-SIZING APPEAL

- 16.1 There is no mechanism to appeal the outcome of the job-sizing of a post unless the postholder is of the view that the process set out in this policy and procedures document has not been followed correctly.
- 16.2 A postholder wishing to appeal must do so within ten working days of receipt of their outcome letter. The appeal must be in writing to the Head of Human Resources setting out clearly where the perceived omission in the process has been.
- 16.3 A postholder can choose to be accompanied by a member of a trade union or professional association. The Head of Human Resources or nominee, along with a nominated trade union official, will hear the appeal. The trade union official will not be from the same union/professional association accompanying the postholder. The postholder will be invited to present the appeal. The job-sizing co-ordinators will not attend the appeal hearing.
- 16.4 The Head of Human Resources or nominee, and a trade union official from the teachers' side will hear the appeal no later than two months from the date of the submission of the appeal. There are two possible outcomes from an appeal:
1. The appeal is upheld and remitted back to the co-ordinators to re-size;
 2. The appeal is not upheld

The decision of the appeal hearing will be final and communicated in writing within ten working days.

- 16.5 A teacher who remains dissatisfied with the outcome can request, via the JNCT Joint Secretaries, to have their case submitted to the SNCT Joint Secretaries of their consideration.
- 16.6 No provision in this policy will prejudice an employee's rights under the approved Grievance Procedure.

17.0 JOB-SIZING CONSISTENCY GROUP

- 17.1 The role of the Consistency Group will be to scrutinise completed job-sizing questionnaires for consistency and to determine whether further guidance is required to support the job-sizing process. Membership of the group will include:
- (a) Job-sizing Co-ordinators;
 - (b) Strategic Education Manager Curriculum (or nominee);

- (c) Strategic Education Manager Performance & Assurance (or nominee);
- (d) Secondary HT
- (e) Primary HT

17.2 The group will meet in late November and May of each year. The note of each meeting will be circulated to members of the Consultative Group, and submitted to the JNCT for information. The group has no delegated authority to request that any post be re-job-sized.

SNCT DOCUMENTS REFERENCED IN THIS POLICY & PROCEDURE

- Handbook of Conditions of Service
- Part 2: Appendix 2.2 Annex A & Annex B
- Part 2: Appendix 2.3, Annex A, (Review Criteria)
- Part 2: Appendix 2.4, Annex A

1. WHOLE SCHOOL/POST HOLDER INFORMATION			
1.4. Type of post	<p>Change(s) to the allocation of responsibilities for formally deputising for the Headteacher amongst DHTs in the school.</p> <p>Change(s) in number of schools in which Headteacher posts have responsibilities.</p> <p>Change(s) in number of schools in which other posts have responsibilities.</p>	A A B	DHTs HT DHT/P T
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 (using the most recent census data submitted)	<p>Change(s) consisting of:</p> <p>+/- 100 pupils, or +/- 10% of the school roll on which the last job sizing was based;</p> <p>which leads to a change in the school roll band.</p>	A	All
1.11. Numbers of staff	<p>Change(s) consisting of:</p> <p>+/- 10 FTE staff, or +/- 15% of the numbers of FTE staff on which the last job sizing was based.</p>	B	HT/DHT
1.12. % of children registered for free school meals	<p>Change(s) consisting of:</p> <p>+/- 10% of the total numbers of pupils in the school;</p> <p>which leads to a change in the free school meals band.</p>	B	All
1.13. Size of school budget	<p>Change(s) consisting of:</p> <p>+/- £100,000, or +/- 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;</p> <p>which leads to a change in the budget band.</p>	B	HT

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: +/- 3 FTE teaching staff; 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: +/- 3 FTE other staff; 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: +/- £5,000, or +/- 20% of the regular annual budget on which the last job sizing was based; 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			
3.1. To review the CPD needs, career development and performance of	None required – covered by 2.1 and 2.2 above.	None	DHT/PT
3.2. To produce and implement the school development	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: +/- 5 classes. +/- 1 subject, or +/- 2 NQs	B C	All All
3.4. Other formal curricular / management responsibility	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

4. RESPONSIBILITY FOR WHOLE SCHOOL POLICY AND IMPLEMENTATION			
4.1. To develop, manage and implement a policy on pupil behaviour	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.	C	DHT/PT
	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"> • 2 bands • 1 band 	B C	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	Change(s) in responsibilities leading to fewer or additional entries being made for this question.	C	DHT/PT

EMPLOYEE POST REVIEW APPLICATION FORM

APPENDIX 2

DETAILS OF POST				
(To be completed by the employee)				
School				
Post				
Name of Postholder(s)				
Current Salary	Scale		Salary	£
<p>I request that the position that I hold be reviewed, as I believe that the criteria for re-sizing has been met. I can confirm that the information that I have supplied is accurate and can be evidenced.</p> <p>When completed you must have your Head Teacher, or in the case of a Head Teacher, Education Group Manager, review the content of the form and sign-off in support of your application. Should a Head Teacher/Education Group Manager not support the application they must provide the rationale for their decision before forwarding for consideration by the job-sizers. Reference should be made to section 8 of the policy and procedure document.</p>				
Signed (Employee)			Date	

REVIEW OF APPLICATION BY APPROVING MANAGER			
(Tick as appropriate)			
I can confirm that I believe that the SNCT review criteria have been satisfied.			
I can confirm that I believe that the SNCT review criteria has not been satisfied			
Comments:			
Signed by (Head Teacher / Educ. Grp. Mgr.)			Date

Please scan and forward the completed document via email to the Human Resources Job-Sizing Co-ordinator at jobsizing@east-ayrshire.gov.uk

Job Sizing Toolkit Question Ref:	Any change(s) to whole school information? (either increases or decreases)	Apply to post of:	Current Applied Sizing Data	Has there been a significant change?	Comments (please provide supporting information and documentation, as required)
Section 1: Whole School Information					
1.4	Has there been change(s) to the allocation of responsibilities for formally deputising for the Head Teacher amongst DHTs in the school?	DHT			
1.4	Has there been change(s) in number of schools in which the Head Teacher has responsibilities?	HT			
1.4	Has there been change(s) in the number of schools in which other posts have responsibilities?	DHT PT			
1.9	Has there been an addition or removal of an Additional Support for Learning Unit/Classes or the addition or removal of an Early Years unit or classes?	HT			
1.10	Has there been change in the school roll of +/- 100 pupils or +/- 10% of the school roll on which the last job sizing was based which leads to a change in the school roll band in the job sizing toolkit? The school roll is taken from the most recent census data submitted.	HT DHT PT			
1.11	Has there been change(s) to the number of staff consisting of +/-10FTE staff, or +/-15% of the numbers of FTE staff on which the last job sizing was based?	HT DHT			
1.12	Has there been change(s) of +/- 10 % of the total number of pupils in the school registered for free school meals which leads to a change in the free school meals band in the job sizing toolkit?	HT DHT PT			
1.13	Has there been change(s) to the size of the school budget consisting of +/- £100,000, or +/- 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 which leads to a change in the budget band in the job sizing toolkit?	HT			
1.14	Has the school become or ceased to be a multi-site school?	HT/ DHT			

Job Sizing Toolkit Question Ref:	Any change(s) to whole school information? (either increases or decreases)	Apply to post of:	Current Applied Sizing Data	Has there been a significant change?	Comments (please provide supporting information and documentation, as required)
Section 2: Responsibility for the leadership, good management and strategic direction of colleagues					
2.1	Has there been change(s) in the direct line management responsibility for teaching staff consisting of +/- 3 FTE teaching staff, which leads to a change in the teaching staff FTE band in the job sizing toolkit?	DHT PT			
2.2	Has there been change(s) in the direct line management responsibility for other staff consisting of +/- 3 FTE other staff, which leads to a change in the other staff FTE band in the job sizing toolkit?	DHT PT			
2.3	Has there been change(s) to the accountability for budgets consisting of: +/- £5,000, or +/- 20% of the regular annual budget on which the last job sizing was based, which leads to a change in the budget band in the job sizing toolkit?	DHT PT			
2.4	Has there been any change(s) in responsibilities for health and safety which leads to fewer or additional entries being made for this question?	HT DHT PT			
Section 3: Responsibility for curriculum development and quality assurance					
3.2	Has there been change(s) in responsibilities to produce and implement the school development plan leading to fewer or additional entries being made?	DHT PT			
3.3	Has there been change(s) in the responsibility to develop the curriculum and monitor learning and teaching consisting of +/- 5 classes?	HT DHT PT			
	Has there been change(s) in the responsibility to develop the curriculum and monitor learning and teaching consisting of +/- 1 subject?	HT DHT PT			
3.3	Has there been change(s) in the responsibility to develop the curriculum and monitor learning and teaching consisting of +/- 2 NQs?	HT DHT PT			
3.4.4	Has there been the addition or removal of whole school responsibility for learning/ behavioural support?	DHT PT			
3.4.1-3 3.4.5-7	Has there been the addition or removal of any other responsibility listed in question 3.4?	DHT /PT			
3.5	Has there been change(s) in timetabled teaching time per week of +/- 10 hours. <i>If 'YES' do not answer next question.</i>	HT DHT PT			

Job Sizing Toolkit Question Ref:	Any change(s) to whole school information? (either increases or decreases)	Apply to post of:	Current Applied Sizing Data	Has there been a significant change?	Comments (please provide supporting information and documentation, as required)
Section 4: Responsibility for whole school policy and implementation					
4.1	Has there been change(s) in responsibilities to develop, manage and implement a policy on pupil behaviour management leading to fewer or additional entries being made for this question?	DHT PT			
4.2.	Has there been change(s) in responsibilities to develop, manage and implement a policy on guidance, pupil support, pastoral care or pupil welfare leading to fewer or additional entries being made for this question?	DHT PT			
4.2.B	Has there been change(s) to formal responsibility for guidance, pupil support, pastoral care or pupil welfare, consisting of +/- 25 pupils in the guidance/pupil support/pastoral care caseload which leads to a change of 2 bands in the job sizing toolkit? If YES do not answer next question.	DHT PT			
4.2.B	Has there been change(s) to formal responsibility for guidance, pupil support, pastoral care or pupil welfare, consisting of +/- 25 pupils in the guidance/pupil support/pastoral care caseload which leads to a change of 1 band in the job sizing toolkit?	DHT PT			
4.3	Has there been change(s) in responsibilities to develop, manage and implement a policy on pupil assessment leading to fewer or additional entries being made for this question?	DHT PT			
Section 5: Responsibility for working with partners					
5.1	Has there been change(s) in responsibilities to work with parents leading to fewer or additional entries being made for this question?	DHT /PT			
5.2	Has there been change(s) in responsibilities to lead or work with colleagues in the same establishment leading to fewer or additional entries being made for this question?	DHT PT			
5.3	Has there been change(s) in responsibilities to work with other establishments and agencies leading to fewer or additional entries being made for this question?	DHT PT			

REVIEW OF APPLICATION BY JOB SIZING CO-ORDINATORS

(Tick as appropriate)

The SNCT review criteria have been satisfied.

The SNCT review criteria have not been satisfied.

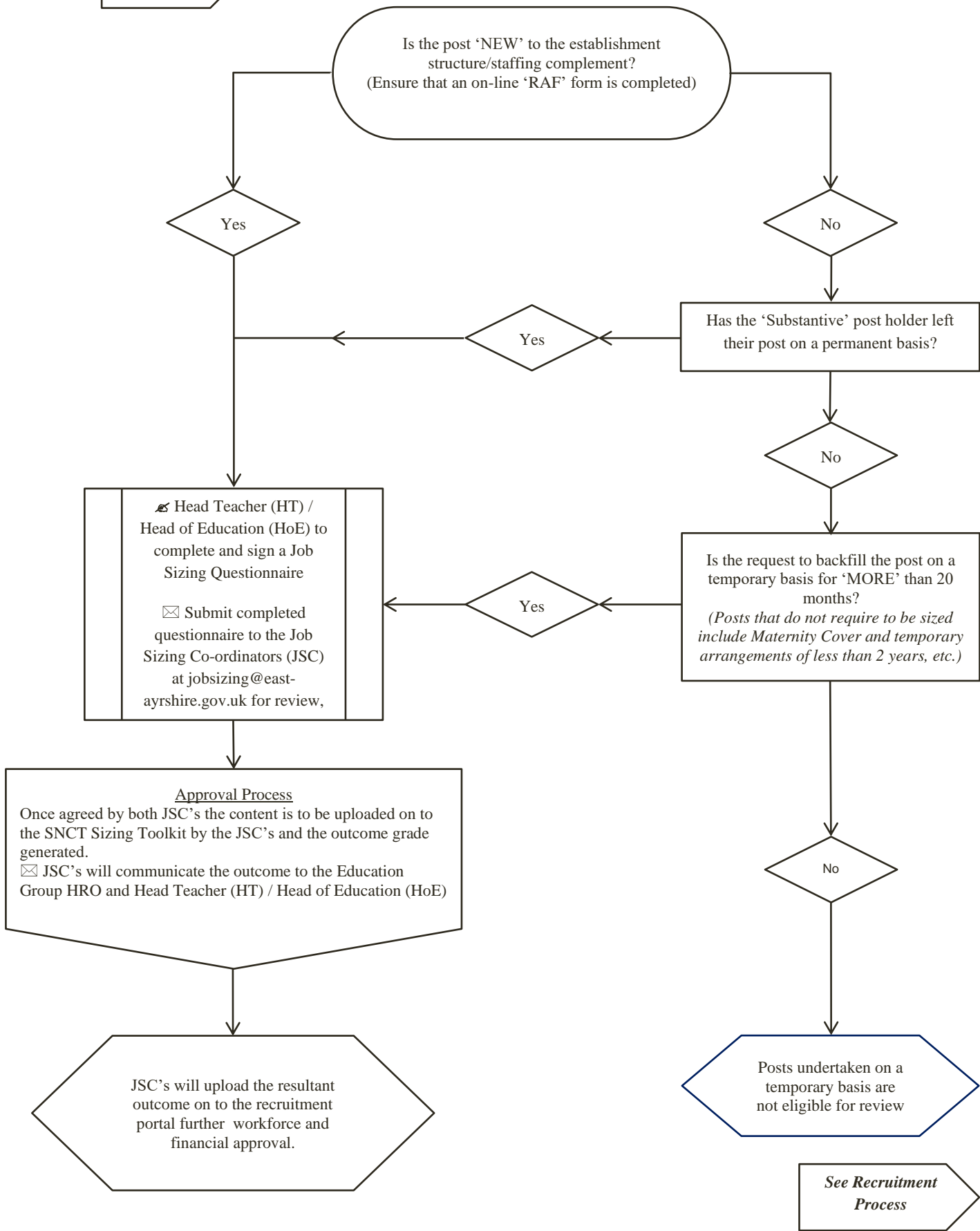
Comments:

Signed by
Management JSC**Date****Signed by**
Trade Union JSC**Date**

Job Sizing Process – New or Vacated Posts

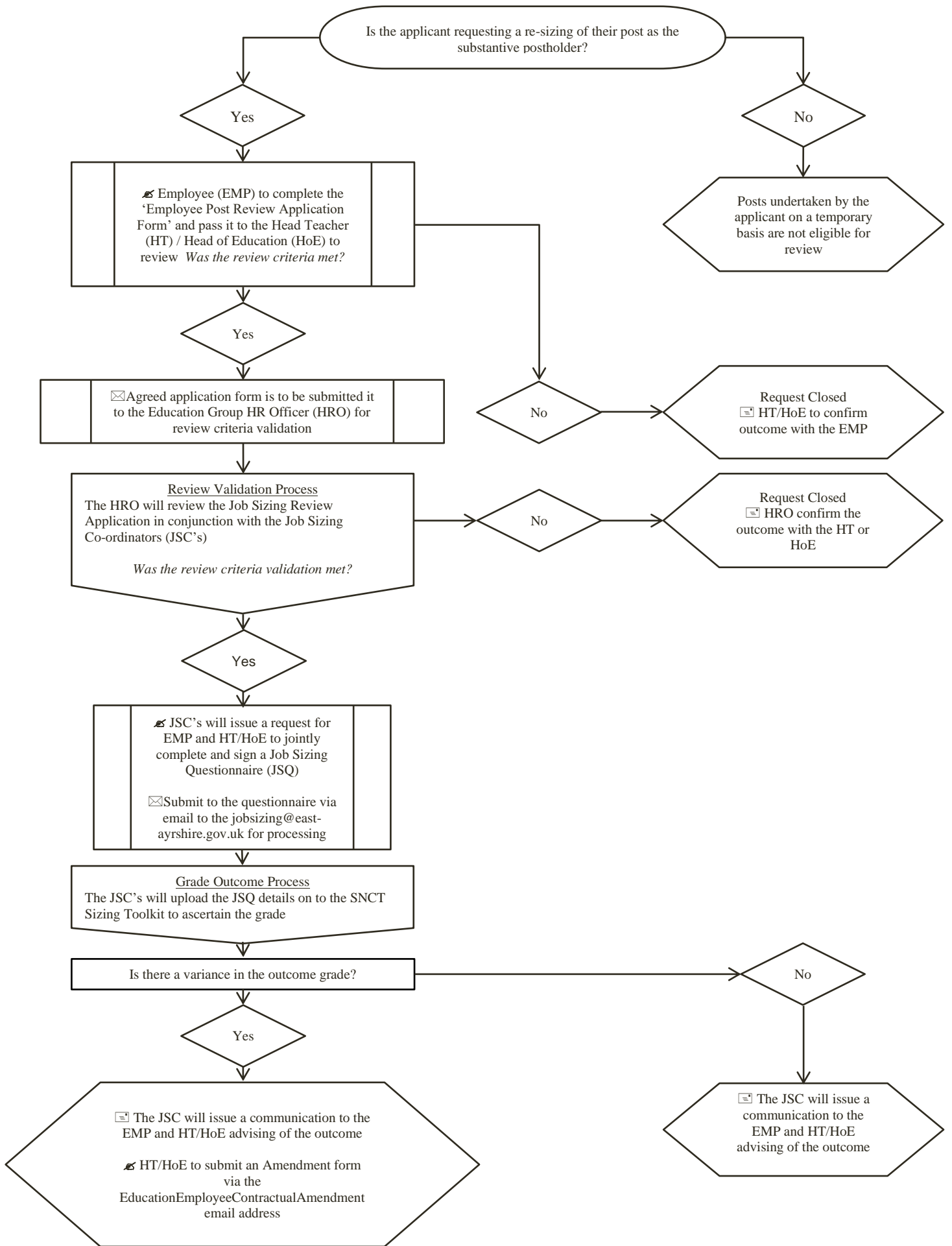
APPENDIX 3(A)

See EST Process



See Recruitment Process

Job Sizing Process – Postholder Request For Review



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, will be completed by the job sizing co-ordinators. Post holders must not complete these questions.

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"/>
Early Years	<input type="checkbox"/>
Other (give details)	<input type="checkbox"/>

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

Early Years unit or classes (except in an Early Years Establishment)	<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 school has responsibility.

Up to 100	<input type="checkbox"/>		
101 – 200	<input type="checkbox"/>		
201 – 300	<input type="checkbox"/>		
301 – 400	<input type="checkbox"/>		
401 – 500	<input type="checkbox"/>		
Over 500	<input type="checkbox"/>		

- 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"/>

- Enter actual FTE

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"/>
	<ul style="list-style-type: none">• Enter actual FTE	<input type="checkbox"/>

DETAILS:

2.3 Accountability for budgets

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

None

Up to £1,000

£1,001 to £5,000

£5,001 to £10,000

£10,001 to £25,000

Over £25,000

- Enter actual budget

2.4 Responsibility for health and safety

This question applies to all posts. HTs may tick the 4th 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 CLPL 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 producing and leading some or all of a curricular, departmental, subject or faculty improvement plan each year	
Responsible for producing and leading some or all of an improvement plan relating to pupil guidance, pupil support or pupil welfare each year	
Responsible for producing 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	
Responsible for producing 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	
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
Early Years	
P1	
P2	
P3	
P4	
P5	
P6	
P7	

- Please enter numbers and text below as required:

Note: In relation to National Qualifications, only national courses (collections of units), national certificates and national qualifications 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.

	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 whole school ICT development to support teaching and learning	
Responsible for pre-5 / Early Years classes in a Primary school	
Responsible for learning and/or behavioural support	
Responsible for an ASfL unit, hub, 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 a discrete 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/carers 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/carers 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)

Appendix 2.2/Annex A: Guidance

JOB SIZING NOTES OF GUIDANCE AND EXAMPLES

The SNCT expects each LNCT to have an agreed policy on how job sizing should be conducted locally. This requires each LNCT to have job sizing coordinators representing the council and recognised trade unions as set out in the local recognition agreement. All job sizing coordinators must undergo national training provided by the SNCT before undertaking the role. A list of job sizing coordinators should be agreed by LNCTs and held locally.

LNCTs agree duties and job descriptions and procedures to be followed when filling promoted posts.

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, i.e. in the case of resizing applications, he/she will also sign the form and the post holder should forward the form to the Headteacher to sign. By doing so the Headteacher affirms the information is accurate and that it captures the responsibilities of the post.

When checking the questionnaire job sizing coordinators will require access to whole school information. In addition, job sizing coordinators will require access to staffing information, timetables, school improvement plans and calendars. Having checked the data and information provided the job sizing coordinators will sign off the questionnaire, following which the questionnaire will be processed to provide a job sized score.

All responsibilities to be job sized must be contained within the remit of the post.

Below is the guidance which must be referred to when completing the Job Sizing Questionnaire:

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 Headteacher (HT), Depute Headteacher (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.

Throughout these notes the title PT Guidance/Pupil Support refers to a PT post in secondary with a pastoral/guidance caseload of pupils.

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. Please note that the third box of Q5.3 (“Responsible for remits that require applying promoted responsibilities in other establishments or agencies”) should not be ticked for such a post as Q1.4 captures the responsibility for multiple 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.

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. In a school where there is a single DHT the box should be ticked for this post. 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 includes more than one DHT and in the 4th box enter the number of SMT posts who share the task of deputising.

The retention of a “formal depute” in 2005 was intended as a transitional arrangement. Where a school has more than one DHT the responsibility for deputising for the HT must be shared between the DHT posts.

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 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 2 – 18, enter the description which is generally used for the establishment.

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

Primary Example:

If a Primary school has Early Years class(es), the 1st box should be ticked. If that school also has an ASfL unit or hub, 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 census data most recently published by the Scottish Government. If the post is vacant and the circumstances in the school will have changed when the appointee takes up post (eg school amalgamations, new Early Years classes) the best available estimate should be used.

The actual number of Early Years places rather than the full time equivalent should be used and the number used should be representative of the number of pupils in the establishment throughout the year.

For example, an Early Years establishment with 50 morning places and 50 afternoon places, 100 should be taken as the representative head count even if it is not operating at fully 50/50 at all times throughout the year.

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 directly line managed within the school and are part of the school's staffing complement. 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 fulltime post would normally be contracted to work in that Council. Councils should also take due account of their own line management arrangements for staff who work across schools.

This would normally include officers/practitioners/educators, office staff, janitors, classroom assistants, 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, facilities management, catering, janitorial and cleaning staff. Where the postholder has shared management with another officer, eg Business support posts, the LNCT should determine the appropriate FTE (see paragraph 2.1 below).

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.

The SNCT agreed that the deprivation factor is captured through free meal registration in the job sizing toolkit. This must 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, schools for children with additional support needs) 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.

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

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

1.13 Size of school budget

Enter the total budget for the school. This entry is for reference purposes only.

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.

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 using dedicated school transport for which the school 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, including PRD, CLPL and supporting absence management and discipline. This does not include management that is limited to supervision of staff in the classroom, or contributing to CLPL 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 is not permitted.

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.

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 up 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 P1 to P3 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 including PRD, CLPL and supporting but not necessarily responsible for absence management and discipline, 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.

A DHT who has no contractual requirement to teach should not be counted. However, a DHT with a contractual teaching commitment should be counted.

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.

Learning support staff, classroom assistants or pupil support assistants when they are working in the classroom should not be as counted as 'line managed' unless there is overall responsibility for line management of them. Credit for this would normally be given in Question 5.2.

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.

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.

Note: All examples are dependent on arrangements existing in councils.

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. 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 up 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 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.

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

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 responsible.

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. An exception to this is where money is collected at departmental level, is required for delivery of the curriculum and the PT has responsibility for spending, for example in Home Economics or CDT. In such cases 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 CLPL. The HT may also delegate some budget to PTs to make them responsible for the budgets for their respective departments/faculties.

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. A claim in this section is permitted where the post holder has additional responsibility for undertaking risk assessment in accordance with the council's policies.

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 and will include direct responsibilities, for example, for risk assessments. **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 CLPL 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 CLPL (eg, a school's CLPL 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.

Details must be given 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 development of the curriculum of the classes shown and for monitoring learning and teaching in these classes.

In relation to National Qualifications, only national courses (collections of units), national certificates and national qualifications 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.

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.

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 Early Years a morning group is treated as 1 class, and an afternoon group also as 1 class. For an Early Years establishment 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).

The following example illustrates an alternative approach to calculating curricular responsibility which avoids the use of decimals:

In a primary school of 16 classes, the HT post is reckoned to have direct curricular responsibility for about half of the curriculum and the DHT post for about a quarter, with the remainder split equally between two PTs. If the HT post is being sized the figure 8 should be entered (against any stage). The entry for the DHT post would be 4, and that for each PT post would be 2.

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 national qualifications. Subjects not included in the SQA catalogue may also be counted. For example, ASDAN and Duke of Edinburgh should each be counted as one subject 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 national qualifications 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. Example, below:

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), ASDAN) 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 NQ classes; S4 - 7 core RE classes and 2 N5 classes; S5/6 - 1 Higher class and 1 N5 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 N4 and N5;

S4 - 4 biology and 3 chemistry classes, with both subjects being offered at N4/5;

S5/6 – 2 mixed S5/6 classes in H biology, 1 mixed S5/6 class in N5 biology, and 1 mixed S5/6 class in N5 biology, plus in chemistry 1 mixed S5/6 classes at Higher and 1 mixed S5/6 composite N5 class;

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

This information would be recorded as:

S1 – subjects 0.5 / NQs 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 N2 and N3 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, hub, class or group for which no other promoted postholder is responsible" should be ticked.

If a PT post has sole responsibility for 1 class in S3 being presented for ASDAN Bronze Award the numerical entries in the questionnaire would be:

Subjects 1 / NQs 1 / Classes 1.

If a PT post has sole responsibility for 1 timetabled class in S3 following an ASDAN short course the numerical entries in the questionnaire would be:

Subjects 1 / NQs 0 / Classes 1.

If a PT post has sole responsibility for 1 timetabled class in S3 undertaking Duke of Edinburgh the numerical entries in the questionnaire would be:

Subjects 1 / NQs 0 / Classes 1

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 EAL provision. 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.

Where responsibility for the overall management and strategic direction of support for learning sits with a DHT post this post would be credited by a tick against the box "Responsible for learning and/or behaviour support". In this situation a PT post's responsibility will be recognised by a tick against the box "Responsible for an ASfL unit, hub, class or group for which no other promoted post holder is responsible".

Where responsibility for the overall management and strategic direction of support for learning sits with a PT post this post would be credited by a tick against the box "Responsible for learning and/or behaviour support".

Where there is overall responsibility for ICT with regard to the development of new and emerging technologies to support teaching and learning, this box may 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 timetabled to support 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.

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. It is a general responsibility for subject PTs to implement the school's disciplinary policy at departmental level and, therefore, a claim for this cannot be made under 4.1 or 4.2.

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 and cannot be claimed by any other postholder

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/carers

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.

All promoted postholders have a responsibility for working with parents/carers and, therefore, this box should only be ticked if there is an additional specific responsibility linked to the school improvement plan.

Primary Example:

For a Primary DHT post with responsibility for P4-7 literacy workshops for parents, the 1st box should be ticked. 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 Example:

For a DHT post with responsibility for delivery of workshops or seminars to parents/carers of S3 and S4 pupils in relation to health and wellbeing issues for the 1st box should be ticked. If, in addition, this post has responsibility for working with parents across the whole school, for example, on mental 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.

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 identified within the school improvement plan 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 Early Years transition or Primary – Secondary transfer, tick the 1st box.

Secondary Examples:

For a PT post responsible for Education for Work/Developing the Young Workforce 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.

**PART 2: APPENDIX 2.4, ANNEX A
JOB SIZING QUESTIONNAIRE FOR PRINCIPAL AND DEPUTE PRINCIPAL
EDUCATIONAL PSYCHOLOGISTS**

RESULTS

Council _____
 Type of post _____
 Name of post _____
 Post holder _____

Job size _____

2. Council population/deprivation _____
 3. Staff management responsibilities _____
 4. Financial information _____

total _____

Salary Point _____

(1) POST HOLDER INFORMATION

Council _____
 Name of Post _____
 Post Holder _____
 Type of Post _____

Principal

Depute

Tick the box if the council has more than one depute post

Enter the number of depute posts

(2) COUNCIL POPULATION/DEPRIVATION

Enter the 0 to 24 population band for the council

0 to 10,000
 10,001 to 20,000
 20,001 to 30,000
 30,001 to 50,000
 50,001 to 75,000
 75,001 to 100,000
 100,001 to 120,000
 120,001 and above

Enter the band for the percentage of children registered for free school meals in the council

0% to 10%
 11% to 20%
 21% to 30%
 31% and above

(3) STAFF MANAGEMENT RESPONSIBILITIES

Enter the band for the number of educational psychologists (including educational psychologists in training (EPiTs) for which the post is responsible

- None
- 1 to 5
- 6 to 10
- 11 to 15
- 16 to 20
- 21 to 30
- 31 and above

Enter the band for the number of other staff for which the post is responsible

- None
- 1 to 3
- 4 to 6
- 7 to 9
- 10 to 12
- 13 to 15
- 16 and above

(4) FINANCIAL RESPONSIBILITIES

Enter the amount of budget for which the post is responsible

- None
- £1 to £20,000
- £20,001 to £40,000
- £40,001 to £60,000
- £60,001 to £80,000
- £80,001 to £100,000
- £100,001 and above

GUIDANCE NOTES FOR PRINCIPAL AND DEPUTE PRINCIPAL EDUCATIONAL PSYCHOLOGISTS

<p>1. Post holder information</p>	<p>Enter the type of post.</p> <p>If there is more than one depute in the council tick the box and enter the number of depute posts. For example, if your council is split into two areas, each of which is managed by a depute tick the box and enter 2.</p>
<p>2. Council population/ deprivation</p>	<p>Enter this information for the council. If you are job sizing a principal post, and the council is split between a number of principals, divide the population by the number of principals and tick the box for the band into which the divided population falls.</p>
<p>3. Staff Management Responsibilities</p>	<p>Include all staff for whom the post holder has direct and indirect line management responsibility. Line management responsibility means overall responsibility for the work carried out by staff. Where staff are part time, include the numbers of staff on a full time equivalent basis.</p> <p>For example, if a principal psychologist directly manages a depute, who in turn manages a team of 2 full time and 1 three-day-a-week educational psychologist, enter 3.6 for the Principal and 2.6 for the Depute.</p> <p>If the numbers calculated fall between bands round up to the nearest whole number.</p> <p>Educational psychologists in training (EPiTs) should be included as educational psychologists and not as other staff.</p>
<p>4. Financial Responsibilities</p>	<p>Enter the band for the amount of regular annual budget for which the post holder is responsible. Principal educational psychologists are generally responsible for the whole council budget for psychological services, even if parts of this budget are delegated to deputies. The budget figure used should exclude:</p> <ul style="list-style-type: none"> • salary and salary-related costs for permanent staff. • (however, training and professional development costs • and costs of temporary staff, if their numbers are not • included as staff managed, should be included); • costs relating to buildings and property; • costs of educational placements; and • budgets for capital expenditure or special one-off funding.

