



Renfrewshire Council Joint Negotiating Committee for Teaching Staff

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Dear Colleague

JNC/10 **JOB-SIZING OF PROMOTED TEACHER POSTS**

Renfrewshire Council Joint Negotiating Committee for Teaching staff (JNC) has approved an agreement on procedures for reconsidering the job-sizing of promoted teacher posts. Attached as appendices are the frequently asked questions (Appendix 1) and additional guidance notes on completing job-sizing forms (Appendix 2) and a re-sizing request form (Appendix 3).

In order to initiate re-sizing, the request form should be completed and returned to the director of education and leisure services. Once the form is returned and it is established the request meets the criteria for re-sizing, a blank job-sizing questionnaire will be issued. Once completed, this will be signed off by the head teacher/manager and validated by a job-sizing co-ordinator. Appendix 3 provides further details.

Yours faithfully

John Rooney (Education and Leisure Services)
Ian McCrone (Teachers' Panel)

Joint Secretaries

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RENFREWSHIRE COUNCIL: EDUCATION AND LEISURE SERVICES

JOB-SIZING OF PROMOTED TEACHER POSTS
Frequently Asked Questions on the Completion of Forms

	Question	Answer
1.	Are nursery children included in the census information and if so, how are they counted in the census - as FTEs or number of heads?	<p>Nursery children are not included in the census numbers (because nursery education is not a statutory obligation) but for school salary purposes they have always been included in the school roll as numbers of heads, rather than FTEs.</p> <p>Therefore nursery children should continue to be included on this same basis for job-sizing and to be consistent with other post holders please enter numbers of pupils at the relevant census date.</p>
2.	What should be included in the budget for which the head teacher is accountable in respect of property management/maintenance costs?	<p>Costs relating to the maintenance of buildings such as repairs, decoration and improvements.</p> <p>Costs such as heating and lighting should not be excluded from the budget if the head teacher is accountable for these monies.</p>
3.	What should be excluded from the budget for which the head teacher is accountable in respect of permanent staffing costs?	<p>Exclude all salary and related costs such as national insurance and pensions costs for all permanent teaching and non-teaching staff.</p> <p>Costs such as CPD costs should not be excluded from the budget if the head teacher is accountable for these monies.</p> <p>If the budget includes amounts for permanent staff vacancies then these amounts should also be excluded from the budget for which the head teacher is accountable.</p>
4.	Many nursery schools do not provide free school meals. How will deprivation be measured in this situation?	<p>Deprivation should be based on what the local authority believes registration for entitlement to free school meals could be if these were offered. If there are other schools offering free school meals to pupils in the same area then the figures relating to these schools should be used. If it is not feasible to identify such schools a local authority average could be used as an alternative.</p>
5.	Should Access be included as a national qualification in 3.3?	<p>Yes. Access levels 1, 2 and 3 should be included as national qualifications, with each level being taken as a separate qualification. Other comparable qualifications (for example A levels) can also be included as national qualifications in response to this question.</p>

6.	In 2.1 and 2.2 what if FTE numbers fall between two boxes?	Round up to the nearest whole number
7.	If the school has a vertical house structure, rather than year groups, is a house a specialist section of the school?	Yes, it may be, but only in the rare circumstance that the school has no horizontal structure in place.
8.	Are boxes aggregated in the weighting system?	In questions 2.4, 3.2 and all of sections 4 and 5 boxes are not aggregated and the box ticked that attracts the highest score will be taken.
9.	PTA example in the notes to 5.1 is not good because it is generally voluntary and the PTA is not usually managed by the school.	This probably depends on local circumstances but the overriding rule that responsibilities must be permanent and contractual responsibility applies.
10.	Can responsibilities be duplicated in different sections of the form?	Generally no. Additional responsibilities in sections 4 and 5 should only appear once, although a range of responsibilities may flow out of being head of a year group.
11.	Why is guidance included as an example of a “whole school responsibility” in the definition?	The guidance team has an impact the whole school. Since guidance PTs are members of this team they can be considered to have whole school responsibility for guidance. In this respect the guidance team is unusual in that several promoted post holders are deemed to share the same whole-school responsibility.
12.	Should morning and afternoon nursery classes with different pupils be treated as a single class, or as separate classes when responding to question 3.3?	Treat as separate classes.
13.	National testing for maths and English applies in S1 and S2. Therefore in questions 4.3 can the PT maths and English tick for impact “on year groups” rather than on “departments/subjects”?	The impact should be on departments/subjects. Although maths and English does apply to whole year groups the primary impact of the pupil assessment responsibility will be on “departments/subjects”.
14.	Apart from those in 3.4 what other boxes should be ticked for learning/behavioural support roles?	We would expect to see behavioural support roles tick a box in 4.1 and learning support would probably tick a box in 4.3. However, this could vary depending on how these responsibilities are managed in each school.
15.	Is it possible for a PT to have a direct management responsibility for a DHT who is teaching in a department for which the PT is responsible?	It is possible, but only if the HT decides that the PT does indeed have overall responsibility for the work that the DHT is doing within the department. In such cases the DHT could be included in the staff managed by the PT on an FTE basis, depending on the time spent within the department.

16.	When sizing a post where there is an unfilled vacancy who should sign the box for post holders signature to ensure that it is not returned as an "error"?	If there is no post holder, we recommend that "vacancy" is inputted in the post holder signature to make this fact clear. The questionnaire should then be signed off by the head teacher in the usual way.
17.	In a modern languages department a PT may be responsible for three languages. This would require an entry of three in subject responsibility of 3.3. There may be three national qualifications within each subject. Can we clarify if this should be entered as 9 or 3 in the number of qualifications section?	The national qualifications box should include the total number of national qualifications for which pupils are presented for all subjects in which the post holder has direct curricular responsibility. Therefore, in this example, 9 should be entered in the number of qualifications box.
18.	Does number of children with transport to school mean entitled children only? (Other children use school transport but pay). Also some children are in receipt of discounted travel so should they be included?	It does mean entitled children only, and not children who use transport but pay. It is also limited to arrangements for which the head teacher is responsible for health and safety and this would not generally include discounted public transport arrangements.
19.	If there are pupils entitled to transport to school, how should this be entered on the local authority spreadsheet?	Do not enter y in any of the boxes. If nothing is entered it will be assumed there are none.
20.	Stand alone nursery schools are not included in the local authority information. Should these be included?	Yes. Please add nursery schools to the spreadsheet - we included the list of schools from the 2001 census so nursery schools will need to be added and you should also make sure that the list is accurate and up to date.
21.	In the local authority information type of establishment question at 1.9 the guidance says there should be a y in one of the boxes only. However, columns K and L need to be ticked in addition to the columns F through to J so are the notes right?	The guidance note is misleading in that it refers only to columns F to J. If there is an SEN or nursery unit more than one box should be ticked.
22.	How should visiting teachers and music instructors be treated as line managed within the school or by the local authority?	<p>The principles, with the definition of line management, are that we need to identify who is responsible for the overall performance of the teacher. In the (hopefully) exceptional cases where it is not possible to identify someone who is so responsible the rules allow staff to split on an FTE basis. Further, direct line management does not include management that is limited to supervision of staff in the classroom.</p> <p>These principles should be applied to music instructors and indeed any other visiting teachers as follows:</p>

		<ol style="list-style-type: none"> 1. If someone outwith the school clearly has overall responsibility for the performance of the music instructor/visiting teacher then they should not be included in the staffing complement of the school in the local authority information or as being directly line managed by individual post holders. A good test here would be to consider whether the post holder can make a final decision on whether to use a particular teacher/music instructor within the school. For example, if the PT of music (supported by the HT) can make a final decision on whether to no longer use a music instructor they would probably have overall responsibility for their performance, but if such a decision would have to be escalated to the authority they would not have overall responsibility. 2. If overall responsibility for performance is within the school, and the test referred to in (1) above is not met, then visiting teachers should be included in the staffing complement of the school and where relevant they can be included as line managed by individual post holders. Clearly the FTE numbers would be adjusted to take account of the time such teachers spend within the school. 3. As a separate issue the working group agreed that where there is direct line management responsibility for music instructors these should be included as non-teaching staff, even though some may possibly be qualified teachers. <p>The above approach does mean that visiting teachers and music instructors may be treated differently in different authorities and perhaps in different schools, but if these notes are interpreted correctly this should reflect the reality of facts on the ground.</p>
23.	In the answer to Q8 (circulated on 31 October 2002) why are the results of 3.3 not aggregated?	The answer should refer to 3.2 and not 3.3 (apologies for any confusion on this)

24.	<p>It seems absurd to ask for number of classes taught, numbers of pupils under guidance teachers, numbers of hours taught, as well as numbers of pupils entitled to free meals, yet not to take into account the numbers of pupils taught. The numbers we report on, the numbers of parents we try to make ourselves available for, the number of guidance reports, discrepancies, possible discipline encounters with a greater variety of pupils, are a result of the numbers of pupils taught. It seems to me that too much consideration is given to the larger subjects. How can job-sizing mean what it says if it fails to take the above into account?</p>	<p>Their rationale for not including numbers of pupils taught is:</p> <ol style="list-style-type: none"> 1. Job-sizing is primarily about management responsibilities (as set out in paragraph 1.4 of the agreement) and it is not about classroom teaching. Classroom teachers are paid the same regardless of the numbers of pupils they teach, and therefore the only logical way to measure teaching responsibilities for promoted post holders is the number of hours taught. Therefore to the extent that promoted post holders are doing jobs that equate to those of classroom teachers the only appropriate way to measure these is on the basis of teaching time. 2. With reference to the items that are in the toolkit: <ul style="list-style-type: none"> • Numbers of subjects/classes for which the post holder is responsible relates to responsibility for developing and monitoring the curriculum. This responsibility is the same regardless of the size of classes • Free school meals does not alter the score for items in the questionnaire that relate to teaching. It alters questions 4.1, 4.2 and 5.3 (see annex E of the local consultation document). All PT post holders will have some score under these questions, based on the size of the school • The main reason for measuring guidance caseload in the bands we have is to measure the extent of guidance responsibilities. This is important because in some schools guidance teachers have smaller caseloads but do a lot of classroom teaching, whereas in others the caseload will be greater and classroom teaching lower.
25.	<p>Should all subject PTs tick a box “other direct curricular responsibilities” in question 2.4?</p>	<p>If a PT has direct curricular responsibility (as defined) then they should tick one of the first two boxes in 2.4, depending on the subject for which they are responsible.</p>

26.	In primary schools, members of the SMT may have a curricular responsibility for the whole school eg maths or language or expressive arts as well as having year group responsibilities. How are these classes counted for the purposes of Q3.3?	<p>Where the notes to the questionnaire relate to secondary schools these are causing some confusion for primary school post holders. In primary, question 3.3 is relatively simple in that post holders should simply enter the numbers of classes for which they are directly responsible for monitoring learning and teaching.</p> <p>It is essential to ensure that the same classes are not counted twice. For example, the HT should not enter classes for which other SMT members have direct responsibility.</p> <p>If there are horizontal (or year group) structures in place then post holders should count the number of classes in the year groups for which they are responsible, as set out in the example on page 16 of the questionnaire.</p> <p>If, however, no horizontal structure is in place this will need to be looked at carefully to avoid classes being double counted. If the only solution is to split classes between post holders and enter fractions of classes, then this can be done, although this approach should be avoided if possible.</p>
27.	If a PT is running with a lighter than usual timetable as a result of probationers within the department, should their teaching load be amended to reflect what the normal teaching load would be?	No. The teaching load should reflect the actual formal required timetabled teaching time in the current session. The reduced teaching time would be compensated for by the fact that the PT will probably have additional direct line management responsibilities for the probationer.
28.	In a community school the DHT and HT have a lot of extra workload eg inter-agency meetings every week, steering group meeting every month etc. Where is this to be recognised?	<p>The SNCT working group agreed that it would not be appropriate to separately include community school status on measuring the DHT and HT post, although the matter was debated at some length.</p> <p>The reason for this is that there are difficulties in defining the words “community school” and the way these are managed varies greatly in different local authorities.</p>
29.	Why is there no recognition in the job-sizing questionnaire for organising absence cover? This is a task that has to be undertaken by a member of the SMT and it is a heavy responsibility!	<p>If just one SMT member has whole school responsibility for absence cover with impact on the whole school they should tick the impact on “whole school” box in question 5.2, rather than the “year groups and specialist sections of the school” box.</p> <p>Absence cover is not included separately in the questionnaire because it is a task that is dealt with in different schools in different ways and is often shared.</p>
30.	How are supernumerary staff to be	If it is clear that the post is supernumerary, and

	treated for the purposes of job-sizing? If the post is supernumerary is it to be job-sized as the post will no longer exist if the post holder should vacate the post?	that it does not effectively exist, then the post should not be job-sized.
31.	What is the position of a PT who organises teaching time in primary schools with assistants or teaching staff, for example, organising foreign language assistants to teach in primary schools? Do they tick “responsibilities in more than one school” in Q1.4?	Organising this kind of primary input should not be included as “responsibilities in more than one school”. The fact that some subjects require the post holder to work more closely with primary schools than others (usually art or drama) is a level of detail that cannot be recognised.
32.	For SEN schools will small school rolls be reflected in appropriate weightings?	Yes. Because the toolkit recognises numbers of staff as well as school roll post holders in SEN schools will be job-sized fairly.
33.	Special needs children automatically get registered for free school meals giving the school 100% registration and is therefore not a true reflection of the deprivation in the local area. How should this be addressed?	The 76% to 100% box should be ticked.
34.	In SEN schools nearly all children require transport. Given that the management of this can be a major responsibility the question was raised about whether travel escorts should be included as other staff?	Yes, they are, so long as “direct line management responsibility” lies within the school and the FTE numbers need to be correct.
35.	Behaviour Support - Off Campus Establishments - section 3.3 - how should PTs etc complete this section of the questionnaire because they are not responsible for development of the curriculum only teaching of specific subjects?	Such PTs should enter their teaching time and tick the behavioural support box in 3.4. This latter box gives a high score to cover responsibilities in the area of behavioural support.
36.	In departments of special education in secondary schools, PTs are responsible For all curriculum subjects. How should they complete section 3.3?	A PT who is in charge of an SEN section of the school should tick the box in 3.4. They should not be entering subjects since other PTs within the school are responsible for these. They should, however, enter the classes for which they are responsible.
37.	Can FSUs and short courses which make up component parts of an SQA course be captured under 3.3?	For the purpose of NQLs, a full course must be developed and delivered to be considered as a NQL, such as Standard Grade or Intermediate 1 etc. However, if the post holder is responsible for FSU classes these should be included in the number of classes column under 3.3.

38.	How is responsibility for the management of student teachers captured in the questionnaire?	Where such responsibilities relate to the whole 2002/03 academic session the student teachers should be included under 2.1 in the same way as probationers. However, where they are temporary short-term arrangement they must NOT be included.
39.	If Access 1, Access 2 and Access 3 are counted as 3 separate NQLs, can Standard Grade also be counted as Foundation, General and Merit?	Access 1, 2 and 3 are considered to be separate courses leading to 3 distinct NQLs respectively. Standard Grade is one course which results in a single NQL, and therefore should be included as one NQL.
40.	Where the responsibilities of a substantive post (eg DHT) have been shared among other post holders whether in the absence of the post holder or in order to lighten the load of the acting/returning post holder, how should these be captured in the questionnaire?	<p>This situation may be addressed in one of two ways. The first is to exclude additional responsibilities that other senior management team members have taken on, on the basis that they are temporary.</p> <p>Alternatively, however, if senior management team members have also given up responsibilities in order to take on these additional responsibilities the posts should be sized as they are at present. This would be acceptable on the basis that we are job-sizing management structures in schools as they are for this session.</p>

ADDITIONAL GUIDANCE NOTES ON COMPLETING JOB SIZING FORMS

1.4 Formal Deputising

Head teachers should not tick formal deputising box for any DHT unless there is only one DHT in the school.

1.6 Name of post holder (if form completed by HT for new Management Structure)

It is assumed that no name will be entered since the exercise is to allocate a salary to new structure posts and job sizing forms will be completed by head teachers

2.1 Number of Staff / FTE:-

- **PT Pastoral and PT RE – supervision of Staff delivering PSE, Social or Religious Education**

This entry will be on an FTE basis for monitoring of social education e.g. 6 classes = $6/30 = 0.2$

Where SQA presentation classes in PSE exist, they would be counted on an FTE basis and added e.g. three classes (2 x H and 1 x Int 2) 5 pds = $15 / 30 = 0.5$ FTE where PT Pastoral has SQA responsibility – may be a DHT

- **PT Pastoral – credit for supervision of Registration Class**

Suppose 10 mins registration per day = 50 mins / 27.5 hrs per class. It is possible to sum the total of Register classes FTE and divide by Number of Pastoral PTs

2.3 Budgets – SQA if Business Support Manager

Retain SQA budget oversight for DHT. Other budgets as managed by PTs Pastoral or Subject

2.4 Health & Safety - PT Pastoral – Year Group

May be applicable for PTs Pastoral for year group/specialist section.

For DHT a tick may be acceptable in either of the last two boxes
e.g. one DHT may have whole school responsibility for Fire Procedures, another may have responsibility for Health etc.

3.3 Social Subject Rotation

3 periods / week for 3 blocks in the year (rotation) would be treated as 1 period / week for the year

Develop curriculum and monitor learning and teaching – PT Pastoral responsibility for PSE / Social Education

PTs Pastoral include Social Education classes and PSE for subjects/and classes but only SQA PSE for number of NQs (Middle column).

4.1 Tick against year group/specialist section for PTs Pastoral may be acceptable and tick against whole school for DHT who is line manager of Pastoral Team.

4.2 PTs Pastoral and DHT

PTs Pastoral tick 'Year Group / Specialist Section of school'

DHT with Pastoral remit ticks 'whole school'

Caseload is ticked by PTs Pastoral. In certain circumstances this could apply to PTs Support for Learning and PTs responsible for a Unit.

4.3 Pupil Assessment

PTs Subject with SQA responsibility OR with assessment responsibilities for courses OR PT Pastoral or DHT with

Assessment responsibility for PSE NQ courses.

PT Pastoral – it may be acceptable for a tick against year group/specialist section

5.1- A box in these sections may be ticked dependent on remit and

5.3 responsibilities for all PTs in relation to year group/specialist section and whole school

RENFREWSHIRE COUNCIL: EDUCATION AND LEISURE SERVICES

**JOB-SIZING
RESIZING REQUEST FORM**

Individual postholders and employers may request resizing of a post if certain criteria are met.

In order to initiate resizing this pro forma should be completed and returned to the director of education and leisure. Once the form is returned and it is established the request meets the criteria for resizing, a blank job-sizing questionnaire will be issued. Once completed this will be signed off by the head teacher/manager and validated by a job-sizing co-ordinator.

There are two points in a year where a review can be initiated and it is advised that any requests for resizing give as much notice as possible to allow the resizing process to be completed before the date any salary change would be payable from.

Where a resizing request form is lodged by 30th June, any change in salary will take effect from the following 1st August (should the process not be completed by 1st August any change in salary will be back dated to 1st August.)

Where a resizing request form is lodged by 31st December, any change in salary will take effect from the following 1st February (should the process not be completed by 1st February any change in salary will be back dated to 1st February.)

Resizing Criteria are graded A, B or C (See SNCT/28 for full details)

To meet the criteria for resizing it requires;

- 1 type A change
- 2 type B changes
- 1 type B plus 2 type C changes
- 4 type C changes

Please complete all 4 pages of this pro forma and return to

The review is being sought by;

the postholder

the Authority

Postholder's name (if appropriate) _____

School/Service; _____

Nature of Post; _____

Signed _____ Date _____

Review Criteria outlined in SNCT/28. The appropriate box(es) in the final column should be ticked to indicate which criteria are being cited as grounds for seeking a resizing

Question <i>as set out in the job sizing questionnaire</i>	Change in responsibilities <i>either increases or decreases</i>	Type of Change	Posts Affected	Please Tick
1. Whole School/Postholder information				
1.4. Type of post	Change(s) to the allocation of responsibilities for formally deputising for the Headteacher amongst DHTs in the school.	A	DHTs	
	Change(s) in number of schools in which Headteacher posts have responsibilities.	A	HT	
	Change(s) in number of schools in which other posts have responsibilities.	B	DHT/PT	
1.9. Type of establishment	The addition or removal of an SEN Unit / Classes or the addition or removal of a Nursery Unit / Classes	A	HT	
1.10 School Roll (based on the September census of the previous school year)	Change(s) consisting 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.	A	All	
1.11 Numbers of staff	Change(s) consisting of: +/- 10 FTE staff, or +/- 15% of the numbers of FTE staff on which the last job sizing was based.	B	HT/DHT	
1.12 % of children registered for free school meals	Change(s) consisting of: +/- 10% of the total numbers of pupils in the school, which leads to a change in the free school meals band in the job sizing toolkit.	B	All	
1.13. Size of school budget	Change(s) consisting of: +/- £100,000, or +/- 20% of the regular annual revenue budget on which the last job sizing was based which leads to a change in the whole school budget band in the job sizing toolkit.	B	HT	
1.14 Physical nature of school	Becoming or ceasing to be a multi-site school	B	HT/DHT	
	Change(s) consisting of +/- 100 pupils transported into school	C	HT/DHT	

Question <i>as set out in the job sizing questionnaire</i>	Change in responsibilities <i>either increases or decreases</i>	Type of Change	Posts Affected	Please Tick
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2. Responsibility for the Leadership, Good Management and Strategic Direction of Colleagues

2.1 Direct line management responsibility for teaching staff	Change(s) consisting of: +/- 3 FTE teaching staff which leads to a change in the teaching staff FTE band in the job sizing toolkit	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 band job sizing toolkit.	A	DHT/PT	
2.3 Accountability for budgets	Change(s) consisting of: +/- £5,000, or +/- 20% of the regular annual revenue budget on which the last job sizing was based which leads to a change in the budgets band in the job sizing toolkit.	B	DHT/PT	
24. Responsibility for health and safety	Change(s) in responsibilities which leads to fewer or additional entries being made for this question in the job sizing questionnaire.	C	All	

3. Responsibility for Curriculum Development and Quality Assurance

3.1 To review the CPD needs, career development and performance of colleagues	None required - covered by 2.1 and 22 above.	Not applicable	DHT/PT	
3.2 To produce and implement the school development plan	Change(s) in responsibilities leading to fewer or additional entries being made for this question in the job sizing toolkit	C	DHT/PT	
3.3 To develop the curriculum and monitor learning and teaching	Change(s) consisting of: +/- 5 classes.	B	All	
	+/- 1 subject, or +/- 2 NQLs	A	All	
3.4 Other formal curricular / management responsibilities	The addition or removal of whole school responsibility for learning/behavioural support.	A	DHT/PT	
	The addition or removal of any other responsibility listed in question 3.4	B	DHT/PT	
3.5 Timetabled teaching time per week	+/- 10 hours	B	All	
	+/- 5 hours	C	All	

Question <i>as set out in the job sizing questionnaire</i>	Change in responsibilities <i>either increases or decreases</i>	Type of Change	Posts Affected	Please Tick
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4. Responsibility for Whole School Policy and Implementation

4.1 To develop, manage and implement a policy on pupil behaviour management	Change(s) in responsibilities leading to fewer or additional entries being made for this question in the job sizing toolkit.	C	DHT/PT	
4.2 To develop, manage and implement a policy on guidance, pastoral care and pupil welfare	Change(s) in responsibilities for guidance, pastoral care or pupil welfare leading to fewer or additional entries being made for this question in the job sizing toolkit.	C	DHT/PT	
	Change(s) to formal guidance responsibility consisting of +/- 25 pupils in the guidance caseload which leads to a change of:			
	2 bands in the job sizing toolkit	B	DHT/PT	
	1 band in the job sizing toolkit.	C	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 in the job sizing toolkit.	C	DHT/PT	

4. 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 in the job sizing toolkit.	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 in the job sizing toolkit.	C	DHT/PT	
5.3 To work with other establishments and agencies	Change(s) in responsibilities leading to fewer or additional entries being made for this question in the job sizing toolkit.	C	DHT/PT	

