

ANGUS JOINT NEGOTIATING COMMITTEE FOR TEACHERS

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Dear Colleague

AJNCT/14 (REVISED) JOB SIZING PROCEDURES

AJNCT/14 Circular was issued on 20 August 2004, setting out the Job Sizing procedures to be used in Angus and was amended in May 2008.

These arrangements have now been revised further to clarify and improve local procedures relating to the national scheme and is attached as an **Appendix** to this Circular.

This amendment to the local agreement was approved by the Angus Joint Negotiating Committee for Teachers at its meeting on 25 February 2015, and subsequently ratified by the Staffing Sub-Committee on 12 January 2016.

Yours sincerely

**SHEONA C HUNTER
JOHN PRATTI**

Joint Secretaries

Enc.

cc: Chief Executive
Strategic Director – People
Head of HR, IT and Organisational Development

ANGUS JOINT NEGOTIATING COMMITTEE FOR TEACHERS
25 February 2015



JOB SIZING PROCEDURES

1 BACKGROUND

- 1.1 Job sizing is a part of the national agreement to improve the professional conditions of service for Teachers in Scotland, "A Teaching Profession for the 21st Century". This agreement was reached between Teachers' Representatives, Local Authorities and the Scottish Executive in January 2001. Further information on the implementation of the national exercise is contained in Annex 1.
- 1.2 Job sizing is an analytical means of determining the size of posts held by Head Teachers, Depute Head Teachers, former Assistant Head Teachers and Principal Teachers. Background information about each post is collected using a job sizing questionnaire. A weighting is then given to each piece of information collected and the resultant data is aggregated to calculate the "size" of the job using the job sizing toolkit[1][2].

2. JOB SIZING PROCEDURES

- 2.1 The procedures for job sizing are set out in the following annexes:
 - Annex 2 Job Sizing Review Schedule
 - Annex 3 Individual/Management Request Procedure
 - Annex 4 Job Sizing Request for Review pro forma
 - Annex 5 Annual Review Procedure
- 2.2 Job sizing will be co-ordinated by a job sizing working group led by the Head of Schools & Learning and will include up to six job sizing co-ordinators, three nominated by the Authority and three nominated by Teachers' Representatives.
- 2.3 Job Sizing Co-ordinators must attend training in the use of the toolkit, as made available through SCNT.
- 2.4 Job sizing will be carried out in accordance with the Job Sizing review Schedule contained in Annex 2.
- 2.5 Under normal circumstances a post can only be reviewed once in any 12 month period.
- 2.6 A review can lead to the job-size score for a post either increasing or decreasing.
- 2.7 Important to note that posts will be subject to a Review if the new details meet the criteria set out in SNCT/28 Appendix 1.

3. DETERMINING THE SIZE OF NEW POSTS

- 3.1 When any new promoted post is created the following job sizing procedure will apply:

- job descriptions will be drawn up with reference to agreed generic job outlines; in the secondary sector, it is anticipated that, in the case of Depute Head Teacher and Principal Teacher (Pupil Care and Support) posts, only generic job descriptions will be agreed for each school (this will allow manageable rotation of remits)
- job descriptions will be agreed by the Head of Schools and Learning following discussion with Teachers' Representatives
- job sizing questionnaires will be completed for all posts of Depute Head Teacher and Principal Teacher by the Head Teacher
- completed questionnaires will be agreed and signed off by the Head of Schools and Learning or by a nominated senior manager
- questionnaires will then be validated and signed off by two job sizing coordinators, one nominated by the Authority and one by Teachers' Representatives
- completed questionnaires will then be processed through the job sizing toolkit
- prior to finalisation of job sizing scores for new posts, a sample of completed and signed off job sizing questionnaires will be scrutinised by the job sizing working group with a view to identifying and addressing any discrepancies or anomalies
- following amendments deemed necessary at that scrutiny meeting, arrangements will be made by the Head of Schools and Learning to communicate to Head Teachers the job sizing scores for all new management posts in their schools

3.2 The job sizing of new posts should be completed prior to advertising. However should it be necessary to advertise a new post before the job sizing process is complete the post will be advertised with a salary stating "subject to job sizing".

4. VACANT POSTS

4.1 All substantive promoted posts which fall vacant will be subject to a review and may therefore require to be re-sized prior to an advertisement being placed.

4.2 However, should it be necessary to advertise a new post before the job sizing process is complete the post will be advertised with a salary stating "subject to job sizing".

4.3 At the time of advertising head teachers/managers will be asked to consider the vacant post against the review criteria and state whether the post requires job sizing.

4.4 The process for reviewing a vacant post is the same as that for an individual/manager requesting a review and is set out in Annex 3.

5. INDIVIDUAL/MANAGEMENT REQUEST FOR REVIEW

5.1 Over time there may be significant changes to whole school data and/or responsibilities of a post which may trigger a review of the job size to ensure the post is still sized appropriately. Also where an allocation of duties has changed, there may be a need to review some of all of the other promoted posts in within the school.

5.2 Postholders or head teachers/managers will have readily available access to the job sizing request procedure (Annex 3) to access information on the procedure and the review criteria.

5.3 Postholders or head teachers/managers can initiate a request for job sizing review. To be eligible for a review the conditions as set out in SNCT, Part 2, Appendix 2.3, Annex A must be met (contained in Annex 4) should be met. This is one A change OR one B change plus two C changes OR two B changes OR four C changes.

6. ANNUAL REVIEW

6.1 In the summer term an annual review of head teacher posts and, where necessary, some or all of the other promoted posts within the school, will take place. This will be led by the job sizing working group.

6.2 The process for this is set out in Annex 5.

6.3 Any salary amendment resulting from the annual review will be effective from the following 1st August from the start of that review.

7. APPEALS

7.1 The only appeals process relates to the accuracy or otherwise of completed job sizing questionnaires.

7.2 The outcomes of the job sizing exercise in relation to new posts will not be subject to an appeals procedure.

7.3 Arrangements for appeals are:

- postholders who wish to appeal against their job sizing scores, submit their appeal in writing to the Strategic Director, within 10 working days of receiving written notification of the outcome of the job sizing, stating the grounds of their appeal,
- in the event of the appeal to the Strategic Director – People, not being upheld, postholders had a right of further appeal to the Staffing Sub-Committee of the Children and Learning Committee, under the AJNCT/10 Grievance Procedures for Angus Teachers

7.4 Postholders who seek a review of the size of their post and whose circumstances meet the review criteria specified in SNCT/28 (revised) would have a right of appeal against the outcome of a resizing exercise in relation to their post. The arrangements for such appeals would be as described in 4.3 above.

Notes

1. *The job sizing toolkit was drawn up with reference to the original Annex B of the "21st Century" Agreement, which has been repealed*
2. *The toolkit is designed to measure a range of responsibilities under the following 4 areas:*
 - *responsibility for leadership, good management and strategic direction of colleagues*
 - *responsibility for curriculum development and quality assurance*
 - *responsibility for whole-school policy implementation*
 - *responsibility for working with partners*

These still broadly reflect the duties as now outlined in Part 2 Section 2 of the SNCT Handbook.

ANNEX 1

ANGUS COUNCIL – PEOPLE DIRECTORATE

NATIONAL JOB SIZING EXERCISE – BACKGROUND INFORMATION

1. A working group of the Scottish Negotiating Committee for Teachers, (SNCT) developed a toolkit to job size the posts of all promoted teaching staff in schools (Principal Teachers, Depute Head Teachers and Head Teachers). The SNCT also appointed PricewaterhouseCoopers as consultants and expert advisers to assist with the design of the toolkit and the implementation of the national exercise.
2. The job sizing toolkit designed by the SNCT working group with the assistance of PricewaterhouseCoopers reflects the duties for each postholder as outlined in Part 2 Section 2 of the SNCT Handbook.¹
 - a. The key principles underpinning the national job sizing toolkit are: the toolkit relates to the post held and not to the postholder, the same job sizing toolkit is used in sizing all the posts which are subject to job sizing, the toolkit is linked to the duties originally outlined in Annex B of the 21st Century Agreement² · the toolkit has been designed to ensure that it captures all elements of the key responsibilities which attach to management posts and that information collected is as objective and factual as possible and the method of calculating job sizes is identical for all promoted (management) posts
 - b. The SNCT agreed the following criteria for measuring each area of responsibility within a given promoted post: the size of the school, numbers of staff managed, numbers of children registered for free school meals (as a measure of social deprivation), the management of budgets, number of subjects (and numbers and levels of national qualifications) for which the postholder is responsible, formal teaching time, specific whole school management responsibilities, caseload for guidance teachers. A structured questionnaire was designed to collect this information. Detailed guidance notes for each section of the questionnaire were also prepared to assist postholders in completing the questionnaire.
 - c. SNCT/24 which confirmed the details of the finalised job-sizing toolkit was issued to local authorities on 4 April 2003
 - d. In line with SNCT advice and guidance, the job sizing exercise for promoted postholders in Angus was carried out in the period October 2002 – February 2003.
 - e. In accordance with SNCT advice, responsibility for the management of this exercise was allocated to a member of the senior management team.
 - f. Arrangements were made to identify and train four job sizing co-ordinators, two nominated by Angus Council and two by Teachers' Representatives. The job sizing exercise was then carried out in the following stages:
 - each postholder, whose post was subject to job sizing, attended comprehensive briefing sessions led by two co-ordinators, one nominated by Angus Council and one nominated by Teachers' Representatives

- following the briefing sessions, questionnaires were issued to postholders along with supporting guidance and instructions for their completion
 - completed questionnaires were agreed and signed off by head teachers in the case of Head Teachers' questionnaires, these were agreed and signed off by Heads of Educational Services as their Line Managers
 - questionnaires from individual schools were scrutinised by the two job sizing co-ordinators who had led job sizing briefing sessions for those schools;
 - thereafter, one of the co-ordinators signed off completed questionnaires
 - all completed and signed off questionnaires were sent to the PricewaterhouseCoopers data processing centre where there were verification or validation queries, PricewaterhouseCoopers sought more detailed information or returned questionnaires for further local scrutiny
 - the data processing centre then calculated job sizes and sent a set of draft job sizes for final comment by the Council
- g. A national review of job sizing led to the issue of SNCT10/20 on 1 November 2010.

ANNEX 2

ANGUS COUNCIL – PEOPLE DIRECTORATE

JOB SIZING REVIEW SCHEDULE

Type of Review	Initiated by	Closing Date for completed documents	Salary change effective from	Eligibility for Review
Annual Review	Job sizing co-ordinators review whole school data and identify appropriate posts →	Questionnaires issued to relevant schools to be returned by 1st May.	1 August	See: SNCT Handbook, Part 2, Appendix 2.3: Annex A To be eligible for a review, any changes to responsibilities of the post since the last job sizing took place must show at least: One A change OR One B change plus two C changes OR Two B changes OR Four C changes
Individual Requests for Review	At request of service manager/head teacher/promoted postholder. →	Request forms to be returned by 1 st May.	1 August	
Individual Request for Review	At request of service manager/head teacher/promoted postholder	Request forms to be returned by 1 st December.	1 February	
Vacant Post	Service Manager/ Head Teacher where responsibilities of the post meet the eligibility for review.	In consideration of recruitment timescales: a) prior to advertising → OR b) advertised at current salary 'subject to job sizing exercise' →	Employment start date Backdated to employment start date	
New post	Service Manager	Prior to advertising → Consider impact on other promoted posts. →	Employment start date 1 August/1 February for changes to other existing promoted posts	Under normal circumstances a post can only be reviewed once in any 12 month period.

ANNEX 3

ANGUS COUNCIL – PEOPLE DIRECTORATE

JOB SIZING REQUEST PROCEDURE – JOB SIZING REVIEW

In accordance with the Scottish Negotiating Committee for Teachers (SNCT) Conditions of Service, all promoted posts in teaching are 'job-sized' and placed on an appropriate salary point as determined by the job sizing process. Over time there may be significant changes to whole school data and/or responsibilities of the post which trigger a review of the job size to ensure that post is still sized appropriately. Where the allocation of duties has changed, there may also be a need to review some or all of the other promoted posts within the school. Under normal circumstances a post can only be reviewed once in any twelve month period.

There are five possible outcomes of a job sizing review:

- There may be no change to the job size score, no change to the salary point and no change to the salary
- There be an increase in the job size score, but since the score is still within the same salary point, there will be no change to salary
- There may be an increase in the job size score, an increase in salary point and an increase in salary
- There may be a decrease in the job size score, but since the score is still within the same salary point, there will be no change in salary
- There may be a decrease in the job size score, a decrease in the salary point and a decrease in salary.

Please refer to the following documents which outline the process, timescales and circumstances in which a review can be initiated:

SNCT Review Criteria http://www.snct.org.uk/wiki/index.php?title=Appendix_2.3

AJNCT/14 Job Sizing <http://intranet/CouncilInfo/Education/AJNCT/ajunct14.pdf>

[Angus Council Job Sizing Schedule DOCUMENT](#)

To be eligible for a review, any whole school changes and/or changes to the responsibilities of the post since the last job sizing took place must show at least:

One **A** change OR

One **B** change plus two **C** changes OR

Two **B** changes OR

Four **C** changes

Further details of the review criteria can be found in the SNCT Handbook, Part 2, Appendix 2.3, Annex A: <http://www.snct.org.uk/library/1290/SNCT-10-20%20Appendix%202.3%20Annex%20A.pdf>

JOB SIZING REQUEST PROCEDURE – JOB SIZING REVIEW CONTD.

Job Sizing Procedure

1. Once a post has been identified as meeting the review criteria, the review sheet should be completed and discussed with the appropriate Service Manager (Schools & Learning) for verification of information(HR).
2. When the Review Sheet is completed, a blank Job-Sizing questionnaire should be issued to all post holders affected by the review exercise(HR).
3. On return of the completed questionnaires, arrangements will be made for two job sizing co-ordinators to meet, discuss and sign off the documents(HR/TU).
4. The questionnaires should then be processed through the job sizing toolkit to ascertain the new job-size for each post(HR/TU).
5. A meeting with the job sizing working group should be arranged during the summer term to confirm the outcomes of the review exercise(Head of Schools & Learning/HR/TU).
6. The post holders should then receive a letter indicating the new job-size score for the post, and any salary adjustment should be issued by no later than the last week in June. Copies of such letters will be copied to the Staffing Team – Education (Resources Directorate) for information or action, as appropriate (HR).

ANNEX 5

ANGUS COUNCIL – PEOPLE DIRECTORATE

ANNUAL REVIEW PROCEDURE

Responsible Section – People – Education - Management Information Team

1. Collate appropriate data following the September census date each year e.g. staff numbers, budget information, free school meals and pupil transport data.
2. Record and maintain Access database of relevant information.
3. By late March prepare "Comparative Data" report for each school, which compare each school's previous year's details (year 1) with those of the most recent (year 1 + 1) e.g. 2005 data compared with what was held for 2004.
4. The base details to be used for each school will be the previous year's census data, for example, in March / April 2006 the data from the September 2005 census will be used.
5. Comparative Data report passed to the job sizing working group by end of March.

Responsible Section – People Education – Job sizing working group

1. Identify those posts which have been affected by the amended data and are therefore subject to review(HR).
2. Once a post has been identified as meeting the review criteria, the review sheet should be completed and discussed with the appropriate Service Manager (Schools & Learning) for verification of information(HR).
3. When the Review Sheet is completed, a blank Job-Sizing questionnaire should be issued to all post holders affected by the review exercise(HR).
4. On return of the completed questionnaires, arrangements will be made for two job sizing co-ordinators to meet, discuss and sign off the documents(HR/TU).
5. The questionnaires should then be processed through the job sizing toolkit to ascertain the new job-size for each post(HR/TU).
6. A meeting with the job sizing working group should be arranged during the summer term to confirm the outcomes of the review exercise(Head of Schools & Learning/HR/TU).
7. The post holders should then receive a letter indicating the new job-size score for the post, and any salary adjustment should be issued by no later than the last week in June. Copies of such letters will be copied to the Staffing Team – Education (Resources Directorate) for information or action, as appropriate (HR).

ANNEX 4 - ANGUS COUNCIL – PEOPLE DIRECTORATE - INDIVIDUAL/MANAGEMENT REQUEST FOR REVIEW

Please tick the sections to show the changes which are relevant to your post. The section numbers are taken from the questionnaire and should be cross referenced with the detailed criteria outlined in the SNCT Handbook, Part 2, Appendix 2.3, Annex A: <http://www.snct.org.uk/library/1290/SNCT-10-20%20Appendix%202.3%20Annex%20A.pdf>

Once completed and signed by your Headteacher/Service Manager and it is established that the request meets the criteria for review, the job sizing questionnaire will be issued for completion and submitted to a job sizing co-ordinator.

Name:		Post			School						
“A” CHANGES		Posts affected	Met	“B” CHANGES		Posts affected	Met	“C” CHANGES		Posts affected	Met
1.4 formal depute		DHT		1.4 number of schools		DHT/PT		1.14 transport to school		HT/DHT	
1.4 number of schools		HT		1.11 number of staff		HT/DHT		2.4 health and safety		All	
1.9 type of establishment		HT		1.12 free school meals		All		3.2 school development plan		DHT/PT	
1.10 school roll		All		1.13 size of school budget		HT		3.3 subjects and NQs		All	
2.1 direct line management teachers		DHT/PT		1.14 multi-site		HT/DHT		3.5 timetabled teaching 5h		All	
2.2 direct line management other staff		DHT/PT		2.3 budgets		DHT/PT		4.1 change to entries against question 4.1		DHT/PT	
3.4 learning / behaviour support		DHT/PT		3.3 classes		all		4.2 guidance, pastoral care or pupil welfare		DHT/PT	
				3.4 other responsibilities listed in question 3.4		DHT/PT		4.2 formal guidance responsibility		DHT/PT	
				3.5 timetabled teaching 10hours		all		4.3 pupil assessment		DHT/PT	
				4.2 formal guidance responsibility		DHT/PT		5.1 work with parents		DHT/PT	
								5.2 lead work with colleagues		DHT/PT	
								5.3 work with other establishments/ agencies		DHT/PT	
Total	“A”s			Total	“B”s			Total	“C”s		

Postholder's Signature:		Date:	Head Teacher/Service Manager Signature:	Date:
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