

Falkirk Council Job Sizing Procedure

1. The purpose of this paper is to notify schools of the timescales and process for the Job Sizing of promoted posts within Falkirk Council. This is a joint process between management (involving Children's Services and HR) and the Unions (EIS and SSTA) with involvement from Headteachers and postholders as appropriate. This process is based on the SNCT guidance and NGT 13 - Job Sizing - The Re-sizing of Promoted Teaching Posts (February 2004).

2. Timescales (for posts which reach a trigger)

The times at which a Job Sizing Review can be requested are:

- i. April/May (to be implemented from the 1st of August)
- ii. November/December (to be implemented from the 1st of February)

It would be useful if schools notified the Service and HR during the annual staffing exercise of any posts which are likely to require re-sizing.

3. Guidelines for Vacant Posts

Vacant posts will not automatically require to be Job Sized, however an initial review will take place to ensure no changes have occurred. Formal job sizing will be dependent on factors such as when the post was last job sized, any changes to remit etc. Headteachers should complete the Job Sizing proforma and submit as normal and a review will be undertaken by HR and Children's Services to establish if Job Sizing is required. HR Recruitment Team should also be notified by the Headteacher of upcoming vacancies to ensure that timescales are met re advertising vacant posts. When advertising vacant posts the time required to Job Size the post should be built into recruitment plans.

4. Guidelines for Advertising New Posts

All new promoted posts must be Job Sized prior to advert and time should be built in to the recruitment process to allow this.

5. Criteria for requesting/initiating a review

In order to request or initiate a Job Sizing review there are criteria which the post must meet. These 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>

A post must meet a minimum of one type A change or two type B changes or three type C changes. Guidance can be found in Appendix 2.3 of the SNCT Handbook:

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

Approval

Headteachers should approve requests for DHT and PT posts, Team Managers should approve requests for HT posts. In the situation where there is an Acting PT/DHT these questionnaires should be signed off by the HT and not the Acting postholders **NB – questionnaires will not be processed if they are unsigned.** If questionnaires are subsequently amended they will be issued for re-signing before final approval of Job Sizing takes place.

6. Process for requesting/initiating a review

The process for requesting or initiating a review can be found in Appendix 1 of this document. Headteacher's should also be aware that triggering a review of one post is likely to have an impact on other posts and this will be discussed with them to establish which posts are in scope for review. Postholder's should be aware that all changes to their post must be considered whether that is an increase or decrease in responsibility. All Job Sizing requests/questions should be sent via grading@falkirk.gov.uk and a Job Sizing Co-ordinator will be allocated to liaise with the establishment. Job Sizing proformas should be accompanied by a summary of the remits of all posts within the Senior Management Team. If there are changes to the remit of a post these should be summarised or identified through a tracked changes version of the document. A post can only be reviewed once in 12 months.

7. Local Guidance

Local guidance will capture situations where a local approach has been taken and which will be considered as part of future job sizing, this will be agreed with Children's Services, HR and EIS. This will ensure consistency and transparency across the Council. Local Guidance will be agreed with the LNCT and will be incorporated into this guidance (see Appendix 3).

8. Processing Questionnaires

Human Resources (HR) will review the proforma with Children's Services to establish if Job Sizing is required and HR will notify the school of the outcome of this review (please refer to Appendix 1 for indicative timescales). HR will issue schools with a Job Sizing Questionnaire with questions 1.8 to 1.14 completed using the current Whole School Information that is provided annually by Children's Services. This section should not be amended by schools. HR will process questionnaires and make arrangements for a meeting with the Headteacher, Team Manager and a Job Sizing Co-ordinator to review submitted questionnaires and discuss any queries. HR will arrange for the questionnaires to be submitted to a Job Sizing Panel meeting for the panel to review submitted paperwork.

NB – Posts will not be Job Sized without the Job Sizing Proforma and Job Sizing Questionnaire being submitted.

9. Job Sizing Panel

A Job Sizing Panel (consisting of representatives from Children's Services, Human Resources and Union representatives) will meet at least twice a year to review job sizing questionnaires. Questionnaires must be approved by the Job Sizing Panel prior to the submission to SLT for final approval and implementation. Children's Services will arrange for Headteachers and Team Managers to be notified of the outcome of Job Sizing.

10. Potential outcome of review

The potential outcomes of a review are as follows and will be notified to you and your Headteacher (and Team Manager in the case of reviews of HT posts) in writing by Children's Services:

- i. No change – although there may have been changes to the remit of the post and the score may have changed it has not had an impact on the grade
- ii. Increase in grade of post – this will lead to your grade being amended and a contractual amendment will be issued for you to sign and return. The changes will be implemented by the 1st of August or the 1st of February depending on when you submitted your request.
- iii. Decrease in grade of post - this will lead to your grade being amended and a contractual amendment will be issued for you to sign and return. The changes will be implemented by the 1st of August or the 1st of February depending on when you submitted your request.

Where the outcome results in a decrease in salary, national arrangements for salary conservation will apply. Please refer to SNCT web-site: <http://www.snct.org.uk/>

11. Appeals process

Appeals should be made in writing to the LNCT Joint Secretaries within 10 working days of receiving the written outcome of Job Sizing. You must clearly state the grounds for your appeal. You will be notified in writing of the outcome of your appeal within 10 working days of the Joint Secretaries review. If you are still unsatisfied you may appeal to the SNCT in writing again stating the grounds of your appeal.

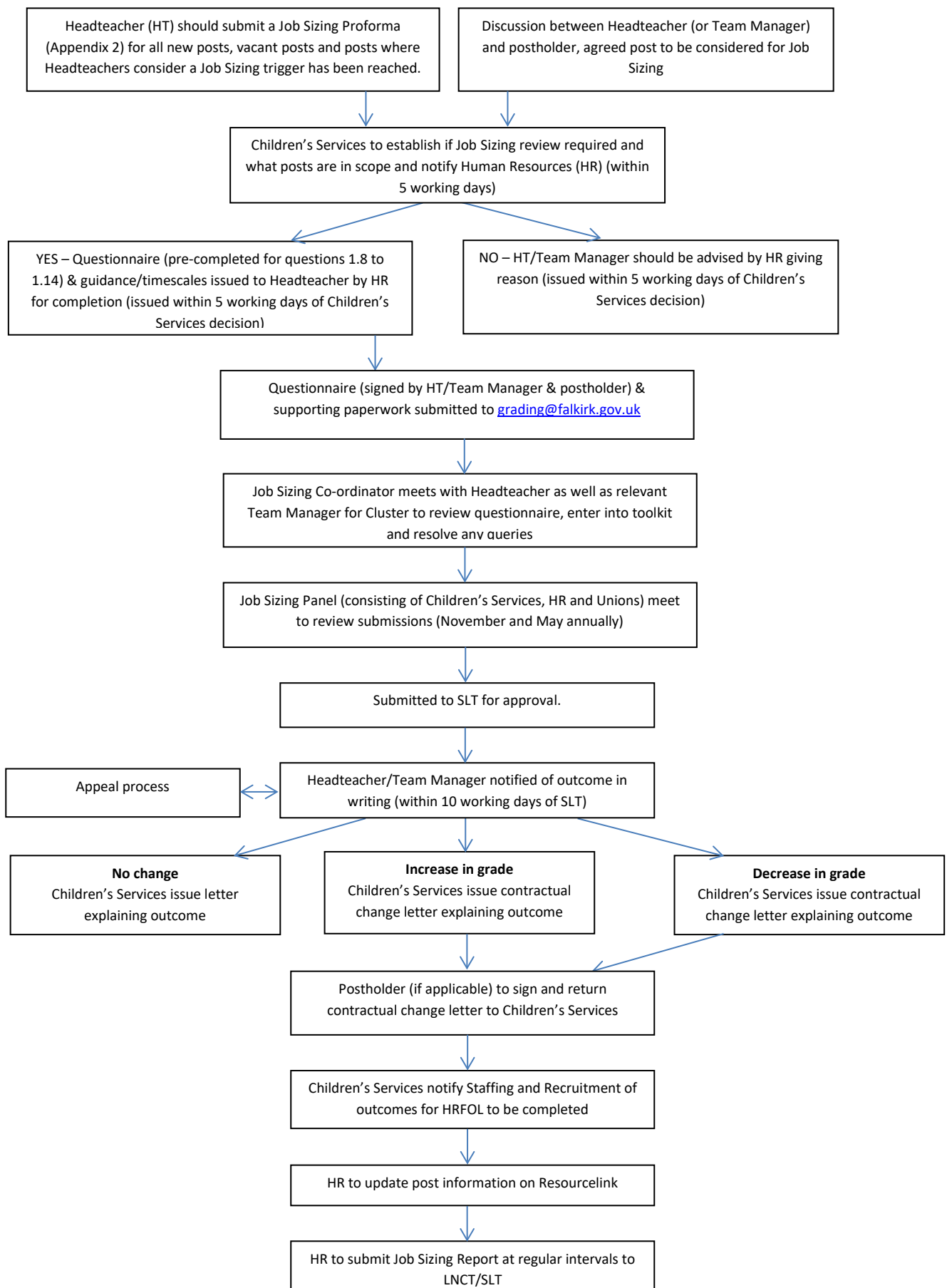
12. Further Information

Full information about Job Sizing can be found on the SNCT web-site:
<http://www.snct.org.uk/>

Please contact your Team Manager or HR on ext. 6270 if you have any questions regarding Job Sizing.

Implemented August 2018

Appendix 1 – Process for Initiating or Requesting a Job Sizing Review



Appendix 2 – Job Sizing Proforma

Please complete the following Proforma for all posts being submitted for Job Sizing (new posts, vacant posts, posts which have reached triggers etc.) and submit to grading@falkirk.gov.uk. Remits of all Senior Management Team should also be submitted (with tracked changes where possible showing any changes to remits since previous Job Sizing).

Section 1 – Post Details			
Post Title:		Name of current postholder:	
School:		Employee Number (if applicable):	
Faculty (if applicable):		Date post was last job-sized:	
Current grade:			
Section 2 – Background to submitting this post for Job Sizing e.g. new post, vacant post, changes to responsibilities, reached Job Sizing trigger etc.			
Please provide as much information as possible for the reason for the submission:			
Will this review have an impact on other job holders (either in the same post or in a different post)? YES / NO Please note that adding a promoted post to your structure will trigger a review of other postholders (e.g. full SMT in Primary, all DHT's in a Secondary where a new DHT is introduced) If yes, please provide details below of who is affected and what the impact will be:			
Section 3 – Criteria for Review			
<p>In line with SNCT guidelines you need to show that changes to responsibilities involve at least:</p> <ul style="list-style-type: none"> • One 'A' change <u>OR</u> • One 'B' change plus two 'C' changes <u>OR</u> • Two 'B' changes <u>OR</u> • Four 'C' changes <p>Please note that if the post doesn't meet these criteria the post will not be Job Sized.</p> <p>Tick the relevant question numbers below to show the changes. The question numbers are taken from the Job Sizing Questionnaire and the table shows which posts are affected by each question change.</p> <p>The review criteria can be found on the SNCT web-site in the following location: http://www.snct.org.uk/library/1290/SNCT-10-20%20Appendix%202.3%20Annex%20A.pdf </p>			

'A' Change			'B' Change			'C' Change		
Question	Posts	Please tick as approp.	Question	Posts	Please tick as approp.	Question	Posts	Please tick as approp.
1.4 (formal)	DHT		1.4 (no. of schools)	DHT/PT		1.14 (transport)	HT/DHT	
1.4 (no. of schools)	HT		1.11	HT/DHT		2.4	ALL	
1.9 establishment	HT		1.12	ALL		3.2	DHT/PT	
1.10 roll	ALL		1.13	HT		3.3 (subject & no's)	ALL	
2.1 staff	DHT/PT		1.14 (multi-site)	HT/DHT		3.5 (5h)	ALL	
2.2	DHT/PT		2.3	DHT/PT		4.1	DHT/PT	
3.4 (LS or BS)	DHT/PT		3.3 (classes)	ALL		4.2 (no. of entries)	DHT/PT	
			3.4 (not LS or BS)	DHT/PT		4.2 (1 band)	DHT/PT	
			3.5 (10h)	ALL		4.3	DHT/PT	
			4.2 (2 bands)	DHT/PT		5.1	DHT/PT	
						5.2	DHT/PT	
						5.3	DHT/PT	

Please sign (both the Headteacher and Team Manager) and return this form to grading@falkirk.gov.uk On receipt of completed paperwork a Job Sizing Co-ordinator will contact you to discuss the next steps.

Signed (HT): _____

Date: _____

Print Name: _____

Signed (Team Manager): _____

Date: _____

Print Name: _____

TO BE COMPLETED BY JOB SIZING CO-ORDINATOR

Do the post(s) meet the criteria for review? YES / NO

If no, why not? _____

Do the post(s) meet the have an impact on any other post? YES / NO

If yes, what other posts need to be Job Sized? _____

Name of Job Sizing Co-ordinator: _____

Signed: _____

Dated: _____

Name of Job Sizing Co-ordinator: _____

Signed: _____

Dated: _____

Date Notified in Writing to HT/Team Manager: _____

Appendix 3 – Local Guidance

The following have been agreed between Children's Services and EIS in relation to the application of the Job Sizing procedure:

Situation	Agreement	Date Agreed
Introduction of a new promoted post	<p>Where a new promoted post is introduced Headteachers should be aware that this can lead to a review of other existing promoted posts.</p> <ul style="list-style-type: none"> • Primary – full management team Job Sizing review to be conducted • Secondary – if a new post is introduced relevant existing posts should also be re-Job Sized e.g. if a new DHT post is introduced all other DHT posts should be re-Job Sized but it may not be necessary to Job Size the PT's. 	August 2018
*Question 3.5 – Timetabled Teaching Hours (see table below for formula)	<p>The maximum teaching hours in the table below should be applied. This is to prevent changes to these hours affecting scores if timetabled commitments change. These figures are based on 22.5 hours class commitment and the agreed management time for each post. These figures will be pro rata for part-time teachers.</p>	July 2018
Introducing new Promoted Post – application of whole school information	<p>Where a new promoted post is introduced the Whole School Information for that school should be amended appropriately e.g. if there are currently 3 PT's in a school and the school has reached the criteria for an additional PT post the Whole School Information should be amended to include this additional promoted post. Headteachers should note that the addition of an extra promoted post can negatively</p>	

	impact on the Job-Sizing of existing posts.	
PT Secondary Posts with cluster responsibilities i.e. Music, PE	Additional guidance developed	August 2018
PEF funding	PEF funding is not included in budget figures for the purposes of Job Sizing. PEF funded posts are not included in staffing figures for	October 2018
Posts advertised subject to Job Sizing	Where approval has been given by Children's Services for a post to be advertised subject to Job Sizing the Job Sizing exercise must be concluded by February or August	January 2019
Full SMT review	Where the full SMT is being Job Sized the Job Sizing for all posts must be concluded at the same time	To be approved

***Question 3.5 – Timetabled Teaching Hours - based on 22.5 hours class commitment**

	Management Time (FTE)			Max. Planned Teaching Time (FTE)			Max. Planned Teaching Hours (Hours) – figures to be used for Question 3.5		
	HT	DHT	PT	HT	DHT	PT	HT	DHT	PT
Secondary (inc. ASN)	1	0.9	0.4	0	0.1	0.6	0	2.3	13.5
Primary (inc. ASN)	1	0.3	0.2	0	0.7	0.8	0	15.8	18