

PROCESS MAP – JOB SIZING REVIEW

Please also refer to MNCT 05/02 and the SNCT Handbook, part 2, Appendix 2.3 and Appendix 2.3 Annex A

- 1 A postholder who believes their post should be reviewed meets with their Head Teacher or in the case of those who are not school-based, their line manager, to discuss the reasons why.

Where the council believes a post should be reviewed, e.g. following the yearly update of whole school information, the Head of Education will contact the relevant Head Teacher/Line Manager and postholder to inform them in writing of the reasons for review and requesting that a job sizing questionnaire is completed and returned. ***It should be noted that changes in whole school information or responsibilities do not always trigger consideration of a job-sizing review immediately. For example where the school roll changes, the relevant data is taken from the most recent census data.***

In all cases a decision on whether or not a post will be re-sized will be made by using the criteria for reviewing posts as detailed in SNCT Guidance:

SNCT handbook Part 2 Appendix 2.3 – Job sizing Review, Revised 10/2010
Part 2 Appendix 2.3 Annex A – Review Criteria

These should be read in conjunction with the questionnaire and the Job Sizing Notes of Guidance and Examples provided at Appendix 2.2, Annex A.

- 2 Head Teacher/Line Manager and postholder agree amendments to the postholder's job description. (***This is important since any job sizing questionnaire must be consistent with the agreed job description, which must accompany the questionnaire.***) (Where a vacant post is to be reviewed, the questionnaire should be completed by the Head Teacher/Line Manager and signed off by the job sizing co-ordinators.)
- 3 The Head Teacher/Line Manager will discuss whether amendments trigger a review of the job size, using SNCT guidance above. (Please note any responsibility which is part of a remit for 2 years, or longer, should be included in the re-sizing of the post.) If they believe that the necessary criteria are met to trigger a review:
- 3a The Head Teacher/Line Manager/Council will complete the form, ***Job Sizing Review Request Criteria Sheet (attached here as appendix 1)***, in consultation with the postholder (unless the post is vacant) to detail the changes which they consider trigger the review.

- 3b The ***Job Sizing Review Request Criteria Sheet*** is sent, along with the previous and amended job descriptions to the Head of Education to verify whether or not the criteria are met.
- 3c Head of Education responds in writing indicating that either:
- Criteria are met and a new job sizing questionnaire should be completed and returned to Teacher Staffing Section (Fairfield House)
 - Criteria are not met and an explanation is given as to why
- 3d Received job descriptions of posts to be sized are logged by Teacher Staffing Section (Fairfield House)
- 4 If the criteria are met:
- 4a The postholder will complete a new ***job sizing questionnaire*** which will be signed off by the Head Teacher/Line Manager.
- 4b The questionnaire will be sent to the Teacher Staffing Section (Fairfield House)
- 5a Receipt of completed questionnaires will be logged by Teacher Staffing Section (Fairfield House) and filed with relevant job descriptions and criteria sheet.
- 5b Teacher Staffing Section will copy and collate forms, ready for the next meeting of the job sizing group and will draw up an agenda noting the posts to be considered. The agenda will be sent to relevant job sizing co-ordinators and to the MNCT joint secretaries.
- 6 Two job sizing co-ordinators (1 from the management side and 1 from the union side) will check the criteria sheet and questionnaire.
If there are queries regarding the job description, criteria sheet or questionnaire, these will be noted on an agreed form and returned to the Head Teacher/Line Manager for action/amendment as appropriate, any changes will be agreed by postholder and Head Teacher/Line Manager.
- 7 Job sizing co-ordinators will sign off the questionnaire.
- 8 The questionnaire data will be processed through the toolkit by job sizing co-ordinator(s).
- 9 Questionnaires will be scanned and filed electronically by Teacher Staffing Section (Fairfield House); paper copies will be filed in postholder's HR file by HR staff

- 10a HR will detail, in writing, any changes to the size of a post (giving points under the four headings and the overall figure for the post) and resulting changes in salary to:
- Postholders
 - Line Managers
 - Finance Section, Education and Children's Services

In relation to salary conservation :

A postholder appointed before 1 April 2001 shall continue to receive his/her previous salary and will continue to receive any increase resulting from pay awards.

A postholder appointed on or after 1 April 2001 whose post has been re-sized and the salary downgraded shall receive a three year period of cash conservation, as defined in paragraph 1.62 of the SNCT Handbook.

- 10b The MNCT joint secretaries will be notified only of the fact that reviews have been completed and individuals contacted about the outcomes.
- 11 Should any postholder be unhappy about the way that the agreed job sizing process has been carried out in determining the outcome of job sizing s/he may appeal using the agreed process.
- 12 The Head Teacher/Line Manager will complete a Delphi changes form to action any salary increase/decrease if appropriate, normally effective from either 1 August or 1 February)
- 13 HR will update the Trent system taking account of any changes, and noting any salary conservation details.
- 14 HR will update Job sizing database with any changes.

Job sizing review checklist

Post	
Postholder	
School	

Action	By whom	Date completed
Job sizing review criteria sheet (J-SRCS) + previous and amended job descriptions (JD) received	Head of Education (HoE)	
J-SRCS + JDs logged	Teacher Staffing Section	
Response sent indicating actions	HoE	
Job-sizing questionnaire received, logged and filed	Teacher Staffing Section	
Forms collated for next meeting of Job-Sizing Co-ordinators	Teacher Staffing Section	
Agenda set & circulated for J-S co-ordinator meeting	Teacher Staffing Section	
Meeting of J-S co-ordinators; queries re. forms agreed & noted on agreed form	J-S co-ordinators	
Post-holders contacted re queries	J-S co-ordinators	
Questionnaires signed off	J-S co-ordinators	
Data put into toolkit	J-S co-ordinator	
Outcome letter sent	HR	
If appropriate, appeal via local appeals process for job-sizing & job-sizing review (if appeal successful process may need to be re-started to outcome letter point)		
Questionnaire scanned and filed	Teacher Staffing Section	
Delphi change form completed and sent to HR	Teacher Staffing Section	
New salary paid from	Payroll	

Job sizing review timeline

Council informs MNCT and HTs of roll increases or reductions or New whole school/council info agreed between HT and council	April/May
Promoted post-holders reminded of Review dates	Sept/Oct or April/May
Post holder discusses potential review with Line Manager or <i>Council discusses matter with postholder</i>	Oct/May
New job descriptions formally agreed between HT and post-holder	Oct/May
Post-holder sends in JSRCS, with new job description, pointing out which criteria have been met, <i>or</i> <i>Council sends letter to post-holder indicating which criteria have been met for consideration of resizing (up and down)</i>	Nov/May
<i>Council confirms there appears to be a need to consider a review and asks post-holder to complete new questionnaire which is then agreed with HT,</i> (if not agreed postholder appeals position) Post-holder accepts the criteria have been met and completes questionnaire	Dec/June
Questionnaire processed as above . Outcome letters sent. Possible appeal if postholder dissatisfied in relation to process, with possible subsequent delay to new salary payment	Dec/Jan or June/July/August
New salary paid or Letter indicating conservation for life/3years from 1 Feb/1Aug	1 Feb/1 Aug

JOB SIZING REVIEW

Ref: SNCT PART 2 APPENDIX 2:3 ANNEX A

NAME OF SCHOOL	POSTHOLDER	DATE

REVIEW CRITERIA

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	Detail of specific changes
1. WHOLE SCHOOL/POSTHOLDER INFORMATION				
1.4 Type of post	Change(s) to the allocation of responsibilities for formally deputising for the Head Teacherr amongst DHTs in the school. Change(s) in number of schools in which Head Teacherr posts have responsibilities. Change(s) in number of schools in which other posts have responsibilities.	A A B	DHTs HT DHT/PT	
1.9 Type of establishment	The addition or removal of an ASL Unit/Classes or the addition or removal of a Nursery Unit/Classes	A	HT	
1.10 School Roll <i>(using the most recent census data submitted)</i>	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	<p>Change(s) consisting of:</p> <ul style="list-style-type: none"> • +/- 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	<p>Changes(s) consisting of:</p> <ul style="list-style-type: none"> • +/- 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	<p>Change(s) consisting of:</p> <ul style="list-style-type: none"> • +/- £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. 	B	HT	
1.14 Physical nature of school	<p>Becoming or ceasing to be multi-site school</p> <p>Change(s) consisting of +/- 100 pupils transported into school</p>	B C	HT/DHT 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	Detail of specific changes
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 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	
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	

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	Detail of specific changes
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 2.2 above.	N/A	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: <ul style="list-style-type: none"> • +/- 5 classes. • +/- 1 subject, or +/- 2 NQLs 	B C	All All	
3.4 Other formal curricular/management responsibilities	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	

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	Detail of specific changes
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, 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 in the job sizing toolkit. Change(s) to formal guidance 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 in the job sizing toolkit • 1 band in the job sizing toolkit 	C B C	DHT/PT 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 in the job sizing toolkit.	C	DHT/PT	

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	Detail of specific changes
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 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 establishment 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	

Bands which impact on job-sizing review

School Roll	% Children Registered for Free School Meals	Size of school budget
Up to 50	0% to 10%	None
51 to 100	11% to 25%	Up to £100,000
101 to 250	26% to 50%	£100,001 to £250,000
251 to 500	51% to 75%	£250,001 to £500,000
501 to 750	76% to 100%	£500,001 to £750,000
751 to 1000		Over £750,000
1001 to 1250		
1251 to 1500		
Over 1500		

Direct line management responsibility for teaching staff	Direct line management responsibility for other staff
none	none
1	1
2 to 5	2 to 10
6 to 10	11 to 25
11 to 25	Over 25
26 to 50	
Over 50	

Accountability for budgets	Formal guidance/pupil support/pastoral care responsibilities with a caseload
none	none
Up to £1000	1 to 50
£1001 to £5000	51 to 100
£5001 to £10,000	101 to 200
£10001 to £25,000	Over 200
Over £25,000	