



*Managing Workforce Change
Structural Changes in Schools
(Teachers)*

Procedure

This procedure provides guidance specifically for the management of structural changes affecting promoted teachers within schools.

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Bryan Kirkaldy (Management Side)

Cathy Grant (Staff Side)

LNCT Joint Secretaries

LNCT

Developing Staffing Plan Proposals

1. Key principles

Headteachers should, after consultation with staff, produce a school staffing plan. This will be used as the planning tool for the development of structures appropriate to that school.

The key principles which underpin the staffing planning process include:

- a. The need for schools to evaluate their own needs for promoted posts within a structure defined by the Council.
- b. The need to ensure collegiate planning of school staffing plans.
- c. The need for staffing plans to be financially viable.
- d. Recognition that promoted post structures need to reflect the needs of the school and the priorities of the Council.

2. Points models

All schools will have a promoted post allocation, and a budget, expressed in a points total which varies according to relevant whole school data. Information relating to the points model is available within schools. The details of this allocation, and of any subsequent proposal for its amendment, will be reported to JCG/LNCT.

3. Planning & reviewing structures in schools

Staffing plans in each school will detail the proposed revised structure, including posts and indicative salaries. Job outlines for all new posts will be supplied to the trade unions along with the staffing plan.

New posts will be job-sized in accordance with the agreed SNCT job sizing arrangements using the locally agreed job-sizing panel.

In planning school structures, Headteachers should have regard to the following existing guidelines.

- a. The total number of promoted posts which can be accommodated within the agreed school allocation.
- b. The need for promoted posts at PT level to reflect the agreed span of control (agreed as normally 4-8).
- c. The need to achieve a balance of cognate areas and recognising coherent subjects which will include English and Maths.

d. The flexibility of the plan to adapt to change and to provide a sustainable & financially viable whole school model for the future, taking account of demographic and school roll projections.

e. The provision of an agreed minimum complement of Pupil Support posts, linked to school size, which schools could adjust from within their overall complement, taking cognisance of the agreed Pupil Support Plan.

f. The recommendation that the formula relating to the ratio between promoted and non-promoted posts is adhered to.

The staffing plan should maintain sufficient flexibility to be capable of amendment in the light of changing circumstances. It should also be possible to create short-term posts (up to 23 months) for specific purposes subject to agreement through the approved mechanisms. This will, in turn, provide opportunities to promote the professional development of staff.

4. Content of staffing plans

The following details need to be included in each school staffing plan and should be held on file within the school and include any paperwork relating to revisions in parts of the plan:-

- "the school executive" proposed under the new structure;
- other professional management posts, e.g. business and / or pupil support managers;
- proposals for "middle management" – PT "curriculum" posts;
- pupil support – any revised structure including PT "pupil support" posts; support staff; ASN Unit
- the consultation process within the school, including all members of staff.

In addition, it would also be useful to provide:-

- schematics of staffing structure both before and after implementation of the plan;
- generic job remits for any proposed new posts (see template remits in Section 9 of this document);
- projected school rolls for the next 5 years with an indication of the impact on the model points;
- a whole school funding model showing affordability.

Developing Remits & the Process for Job-sizing

1. Remits and responsibilities

The SNCT Handbook of Conditions of Service provides outlines of duties for Teachers,

Principal Teachers, Depute Headteachers and Headteachers. Headteachers are required to follow these guidelines in developing job descriptions, an example of a PT remit can be found at Appendix 1.

Consultation on remits should be conducted at school level with local representatives to ensure that the SNCT guidelines have been followed.

Remits for all promoted posts should be produced in advance of an advert being placed.

Generic remits are recommended as a means of ensuring transparency and consistency across schools.

Discussions should take place with staff in areas affected by the introduction of any new post, with a view to clarifying the scope of the new post and its implications for other staff.

Remits for all new posts should be shared with union reps within schools prior to submission for formal job-sizing.

2. Implications for Other Posts

Given the importance of the span of control, posts which span more than one discrete subject area need not be created in every school. Where such posts are to be created, however, it is anticipated that the post will be job-sized within the maximum allowance (PT 8, 196 points). Where this is not the case, a revised structure should be considered. This might include PT posts in discrete subject areas or a structure which allocates subordinate PT posts, subject to availability within the budget and overall school complement.

In very large departments or curricular areas, there should be detailed consideration of the role and suitability of subordinate PT posts, subject to budget and overall complement. It is however important to note that these posts must also be job-sized and be consistent with the overall staffing plan for the school.

As with any post, duties will change through time and according to circumstances. As such, it is important that consultation takes place to ensure that these posts continue to be fit for purpose, acknowledge the status of the current postholder and contribute to the effective management of the curriculum within the new structure. When reviewing remits it is important to ensure that changes take account of the

skills and experience of the current postholder. In the majority of cases remits will be agreed as part of the school's consultation process, however, any which depart significantly from the generic remit should be referred to the JCG for consideration.

A conserved post holder may also be allocated additional duties commensurate with their conserved salary, for the period of that conservation. In some circumstances it may be possible to consider duties across schools or at Council level in dialogue with the post holder.

In addition, where a conservation issue can be resolved by redeploying a promoted post holder into a vacant post this should be explored through the agreed Teacher transfer process, as set out in (LNCT/6).

3. Relationship Between New PTs and Continuing PTs (discrete subject)

3.1 It is important that continuing PTs have a remit which

- ensures that the skills, experience and status of the PT (subject) will continue to be valued and recognised
- reflects the needs of the school and the curriculum area in which he/she is employed.

3.2 Where a conserved PT remains in post, he/she will normally continue to exercise day-to-day responsibility for his/her present area of responsibility for as long as he/she is paid at the level of PT. In practice, the conserved PT will undertake duties as described in the remit for the post. These duties should normally relate to subject-specific responsibilities and may include:

- Responsibility for the day to day running of their subject area(s), e.g.
- Planning curriculum development within the subject area(s)
- Organising and planning appropriate courses to overtake the curriculum
- Requisitioning appropriate materials, within the overall budget allocation
- Making recommendations in relation to the allocation of staff to classes within that subject.
- Organising the appropriate assessment of pupils, within the policy of the school and the faculty
- Advising the curricular PT on subject specific issues.

3.3 However, it might be necessary to make adjustments to the remits of any PTs from the date of the appointment of a new PT Curriculum, since the same responsibilities cannot be allocated to more than one person under job-sizing arrangements. Such adjustments should be discussed with both parties with a view to reaching agreement. Where agreement cannot be reached the matter should be referred in the first instance to the

Joint Secretaries of the JCG/LNCT.

3.4 The non-class contact time for principal teacher(s) within a particular Curriculum area will be considered by school management within the resources available to it. In general terms, the amount of non-class contact time allocated is likely to be commensurate with the duties associated with the post. In all such decisions, account will be taken of any discussions and agreements on revised remits.

4. Job-Sizing

Completed job-size questionnaires for new posts, along with remits should be sent to the office of the appropriate Service Manager in Rothesay House. Forms will then be sent to job-sizing co-ordinators who will advise of the salary level attributed to the new post.

Before the post is advertised, schools will have an opportunity to:

- a. confirm the post and accept it as within budget;
- b. adjust the post to suit school needs, subject to resizing;
- c. conclude the consultation exercise at school level

It is good practice to consult with authority staff about job-sizing values as early as possible, to prevent any delays at this stage of the process. Opportunities will be available for Headteachers to model posts before submission of forms.

Once a post has been filled, any subsequent vacancies for the same post can normally be advertised without a need for further re-sizing, although job-sizing outcomes will be checked against the most recent whole school data to ensure the grade for the post is still appropriate.

Arrangements for re-sizing of existing posts are covered by the SNCT Handbook of Conditions of Service, Part 2, Appendix 2.3 and related council circulars.

Consultation

Consultation with staff

Whenever changes to management structures are being considered, Headteachers are required to consult with members of the school community and to take account of views expressed in reaching decisions. Equally, consultation is necessary when there is a proposal to change an existing staffing plan. Such consultation should be carried out in accordance with the processes set out within Fife Council's Managing Workforce Change Policy.

It is expected that full and meaningful consultation with staff should take place and be recorded as part of the process of preparing school Staffing Plans. The consultation process will include the need to:

- Consult with the school joint committee of representatives of teacher trade unions, as represented on the LNCT, proportional to the numbers of each union's membership in school and with whom the arrangements on working time are agreed. Thereafter all staff should be consulted on the proposals.
- Proposals should be discussed at staff meetings held for that purpose.
- Opinions should be sought from members of staff and while staff from different areas of the school can usefully be consulted as distinct groups, such discussion should not displace the opportunity to ascertain individual views on a one-to-one basis, where appropriate.
- Whilst Staffing Plans do not require formal agreement to be reached at school level, in the spirit of partnership working, wherever possible, attempts should be made to gain a consensual view. Arrangements should ensure that both collective and individual views are gathered and reported back in such a fashion as to ensure the proper balance between information given in confidence and the need for open reporting.

Staff representatives on the joint committee should be provided with the opportunity of recording any disagreement they may have with any of the proposals and the reasons for this.

Implementation

1. Proceeding with the new structure

Where a new structure for a school has been subject to the agreed consultation process and an opportunity occurs which allows the new structure (or part of the new structure) to be introduced, the new post/posts will be filled through a process appropriate to the context of the managing change exercise and in consultation with the Trade Unions. The processes which may be utilised are set out in Fife Council's Managing Workforce Change Policy.

2. Matching

Wherever possible the impact on staff following the revision of a staffing plan should be minimised. In situations where a staffing plan has been reviewed and amended a matching process should be applied. Guidance on the application of the matching process is provided in Appendix 2. The guidance document may be subject to revision following consultation with the Trade Unions.

3. Transfer

It is important to ensure that each affected member of staff is aware of how the new staffing plan impacts them. For any member of staff who has not been matched to a post within the staffing plan, they will become eligible for transfer as per the provisions within LNCT/6 Teacher Transfer Policy & Procedure.

4. Ring-fenced Interviews

Following consultation, it may be appropriate to initiate a process to restrict the pool of applicants for vacant posts, where it can be demonstrated that this will reduce the impact of structural changes and the number of staff who are outwith agreed structures.

5. Revision of Remits

If required, a review of remits will be carried out for any postholders who have not been matched to posts within the new structure. This process will be conducted as set out in Section 2, Paragraph 2.

Appeals

The formal appeals process relating to the management of structural change is set out in Fife Council's Managing Workforce Change Policy. However, in advance of submitting a formal appeal, every effort must be made to resolve the issue informally. A representative from Management, the Trade Unions and Human Resources will look at any appeal in the first instance.

Examples of some concerns which may be referred to this group are:

- the compliance of remits with the SNCT Handbook provisions;
- unresolved issues relating to the proposed staffing plan;
- the matching guidance not being applied correctly;
- the transfer process not being applied correctly

Only where the concern raised relates to one of the grounds of appeal, as set out within

Fife Council's Managing Workforce Change Policy, will the formal appeal process will be initiated.

APPENDIX 1

ILLUSTRATION OF A POSSIBLE PRINCIPAL TEACHER REMIT

SCHOOL NAME

PRINCIPAL TEACHER OF (subject(s) as listed in school plan)

SALARY: £ Subject to Job sizing

1. General Information (*Introductory statement about the school and its context. This includes the reason for the vacancy and assumed starting date*)

2. Purpose of the Job

To manage and lead a team of teaching staff within School to ensure high quality teaching and learning with the ultimate aim of high attainment for all pupils. The post-holder will be one of several appointments in the school's new management structure, a copy of which is attached.

3. Job Scope and Context

The PT has a very important contribution to make to the work of the school. He/she will be an active member of the extended school management team whose primary role will be to accept strategic responsibility for all aspects of teaching and learning in (the *agreed area*), for the management of staff, curriculum and resources and for any whole-school issues which arise within that area.

It is expected that all PTs will participate fully in discussions on aspects of the curriculum, organisation and policy of the school. In short, while all PTs have a right to be fully involved in discussions about the development of their subject(s) and a responsibility to advise senior staff about their curriculum and organisation, it is expected that they will also exercise influence on the direction and review of all matters of school curriculum, organisation and policy.

Principally, the post-holder will require to operate in a collegiate manner with colleagues in a quality assurance role to help establish effective teaching and learning environments within all classrooms. Within this context, the post-holder will:

- Monitor and evaluate classroom practice and, through an operational involvement in classroom activities, be able to work with and advise colleagues on best practice in a professionally supportive and practical manner.
- Develop and retain an overview of the direction, scope and pace of curriculum development.
- Review classroom practice to ensure an appropriate match of methodology with pupil requirements.
- Provide active support for colleagues wishing to improve their skills in classroom practice.

- Ensure that colleagues take account of school, Council and national policies and priorities in their planning
- establish suitable procedures to allow discussion and consultation with staff on all aspects of organisation and policy
- Ensure that assessment records are carefully analysed to highlight areas of success or concern which might reflect teaching and learning approaches and which might be celebrated, shared or addressed
- Ensure that available resources are appropriately allocated in line with agreed school and departmental development plans and that any comparative resource shortfalls are identified and addressed.
- Promote, develop, implement and monitor school policies related to teaching and learning.
- Be involved in the recruitment of staff within school and authority policies and procedures.
- Oversee Development Plans for the appropriate priority areas and be accountable for their progress.
- set clear departmental aims, priorities and policies and establish appropriate procedures to monitor, evaluate and review departmental practice.
- Oversee and direct any whole-school issues which are relevant to the appointment

The post-holder will have a reduced teaching commitment which reflects the scale of responsibilities associated with this post.

4. Responsibilities and Duties of a Principal Teacher

The main duties associated with the post of PT will be as listed in the agreement, *A Teaching Profession for the 21st Century*. Broadly, this includes

A. Department Management

- (i) Establishing, monitoring and evaluating departmental aims and priorities.
- (ii) The management, deployment, development and welfare of staff.
- (iii) Staff support on subject related matters.
- (iv) Management of non-staff resources.
- (v) Assessing and reporting upon pupils and liaison with parents.
- (vi) Arrangements for departmental meetings.

B. Curriculum Management and Development

- (i) Planning, developing and evaluating the curriculum.
- (ii) Methodology and assessment.
- (iii) Liaison and co-operation with other educational establishments and recognised bodies.

C. School Responsibilities

- (i) Professional contribution to the Management policies of the school including as appropriate advising the Headteacher on subject related matters
- (ii) Implementation of whole school policies.
- (iii) Oversight and development of any specific school issues agreed as part of the post remit
- (iv) Liaison and co-operation with advisory and support services and other departments as appropriate.

D. SQA and Related Duties

Administration of arrangements in relation to national examinations and co-ordination of arrangements for presentation of candidates.

In addition, all PTs accept a number of specific tasks every session following the review of the work of their department, the preparation of departmental plans and annual review meetings with the Head Teacher. The Principal Teacher will also liaise with Guidance staff and senior staff as appropriate and especially with the member of the BOS who has responsibility for the development and support of the department. He/she will also consult with the PT LSS on the provision of an appropriate curriculum for all pupils.

5. Criteria for selection: (To be added by schools. See policy on recruitment and selection)

6. Accountability

The PT will be accountable in the first instance to the Headteacher and thereafter to any DHT with responsibility for his/her area of operation.

APPENDIX 2

GUIDANCE ON MATCHING ARRANGEMENTS

Each post in the structure should be compared with posts from the previous structure to determine the extent to which there is a match between the duties. The duties must either equate in all essentials or be broadly similar.

The way in which this will be determined will be through the application of the following principles.

1. Consultation on the new structure must have been concluded and comply with the arrangements within Fife Council's Managing Workforce Change Policy.
2. The post in the new structure must be within +/- 2 scale points of the grade of the current post. Any personal conservation of the postholder is not currently considered as part of this process.
3. If the post in the new structure has a multiple subject faculty e.g. combining science or art/music/drama, etc, then the current post must also have promoted responsibility within a similar faculty arrangement, although all the subjects do not need to match.
4. The individual must meet the minimum criteria for the role.
5. An assessment of the similarity of remits will be undertaken using job-sizing toolkit data for the current and new post. Scoring in sections 2 to 5 of the toolkit and the overall score must have a 75% similarity between posts.

Job-sizing Scores Assessment Table - (Use same whole school data year)

J-S Toolkit Sections & Scoring	Current Post Scores	New Post Scores	Within 75% Yes/No
Section 2*			
Section 3*			
Section 4*			
Section 5*			
Total Score**			

* A minimum of 3 out of 4 of the Sections must be within 75% for this to be considered a potential match

and;

** The total score must be within 75% for this to be considered a potential match.

If all the principles listed above are met then the post can be considered to be a match.