

EAST AYRSHIRE COUNCIL

**EAST AYRSHIRE COUNCIL JOINT NEGOTIATING COMMITTEE FOR TEACHERS –
4 JUNE 2003**

MANAGEMENT STRUCTURES IN PRIMARY SCHOOLS

Report by Director of Educational and Social Services

1. PURPOSE

- 1.1 To seek agreement on future promoted post structures within primary schools.
- 1.2 Where schools have a specialist facility, such as a special educational needs unit or nursery class, attached to them and which is under their direct control, the arrangements for promoted posts within that facility should be considered as an integral part of the overall school management and promoted post structure within the terms of this and related agreements.

2. BACKGROUND

2.1 A Teaching Profession for the 21st Century

The national agreement, "A Teaching Profession for the 21st Century" described an improved and simplified career structure for all teachers. This consists of progression from classroom teacher to principal teacher, depute headteacher and headteacher. Simultaneously, a progression from probation to main grade and chartered teacher was also defined. In practice, this means that the existing grades of senior teacher and assistant headteacher will disappear with effect from August 2003. The concept of job-sizing was introduced to support the process of change. The relevant section of "*A Teaching Profession for the 21st Century*" is given at Appendix 1.

From 01 August 2003, senior teachers will assimilate to the third point on the Chartered Teacher pay scale for salary purposes unless affected by other parts of this or other agreements. For other promoted post holders it is possible that that the initial job-sizing exercise may result in them being conserved at a particular salary point.

All teachers holding promoted posts at 31 March 2001 will continue to be protected by the conservation arrangements outlined in section 6.3 of the Scheme of Salaries and Conditions of Service. All teachers appointed to promoted posts from April 2001 onwards will be entitled to cash conservation for a period of 3 years should their substantive salary be downgraded.

The duties associated with each grade of post was defined in Annex B of “*A Teaching Profession for the 21st Century*”, which is presented here as Appendix 2 for ease of reference.

3. PRESENT POSITION

3.1 Sectoral differences

The career structure described at paragraph 2.1 above is intended to apply to all sectors. The application of promoted post structures to the secondary, pre-school, special education and various support services will be the subject of separate agreements.

3.2 Standard Circular 66

The development of promoted posts in primary schools in East Ayrshire has been guided by the conditions described in Standard Circular 66. The effect of Standard Circular 66 is that schools presently have similar management or promoted post structures which are related to roll, with some allowance being made for deprivation. The numbers of promoted post holders at particular levels therefore is similar or equivalent between schools of similar sizes. New managerial structures under “*A Teaching Profession for the 21st Century*” and the associated transitional arrangements require, so far as possible, to take account of present provision.

This agreement will form the basis of revision of Standard Circular 66.

4. PROPOSALS

4.1 Principles

In order to manage the change process, a number of principles require to be established:

Service maintenance – the service available to pupils, parents and the community resulting from changes must be at least equivalent to, or better, than those prevailing before implementation of the agreement.

Efficiency – the national agreement makes clear reference to the introduction of “an improved and simplified” career structure for teachers.

Cost neutrality – in the absence of the provision of any national change fund, any modification to management structures must be cost neutral. This principle is particularly challenging given the effects of conserved salaries described in “*A Teaching Profession for the 21st Century*” and the uncertain implications of job-sizing at the time of this agreement.

Career progression – structures must ensure that realistic career progression routes exist for teachers that are readily understood and enable staff to plan for their future development. Simultaneously, arrangements must ensure that structures enable staff to accumulate the skills at one level that will enable them to progress successfully to the next promotion step. Within this concept, the career needs of present senior teachers must be recognised.

Equality and fairness – structures must be developed, and recruitment to posts must be managed in a way that is transparent, well-communicated and open to external scrutiny.

Morale – systems must recognise the longer term aspirations of the profession. Possible career paths must be easily understood and should be associated with programmes of supporting professional development and review.

Delegation to schools – best practice in management allows delegation to schools. In this way, local needs can be recognised, and met.

These principles will form the basis for evaluation and testing of any emergent management structures at establishment level and overall strategy at Authority level.

4.2 Overall School Management Structure

For the purpose of developing management structures, schools should consider that tasks require to be overtaken in three areas of activity. These are:

- The Curriculum and Learning and Teaching
- Pupil Support
- Logistics and administration

The concept of pupil support has become established in schools and may be taken to include such areas as guidance and pastoral care, learning support and behaviour support. A closer co-ordination of these areas is in line with the recommendations in recent national reports particularly in relation to better integration of children's services. A school that has a strategic and co-ordinated approach in this area is much more likely to be able to meet the requirements of integration of children with additional support needs together with the demands of changes in Race Relations and Disability Discrimination legislation together with child protection and widening responsibilities on pupil welfare and the provisions of SSSA 2000.

Clearly all involved in education have elements of logistics and administration as part of their jobs. However, the infrastructure of schools is becoming more complex with developments in, for example:

- The numbers and range of support staff employed
- Developments in the ICT infrastructure
- Increased attention to health and safety
- Prominence of delegated budgets
- Wider legislative changes
- Buildings maintenance and property issues.
- Initiatives associated with specific or project funding

Many of these matters will be tackled within the context of Annex E of "A Teaching Profession for the 21st Century" at the operational level by developments in the ancillary staffing of schools, and particularly the role of the administration and finance officer (AFO). However, clearly it is important that resources, including personnel, are organised in such a way to best deliver the school's educational aims. Part of the promoted post structure of schools should therefore hold clear responsibility for these areas of activity. **Promoted posts**

~~related to whole-school or fixed term initiatives offer possibilities of flexible response for schools in this area together with significant career development opportunities for teachers.~~

4.3 Managing the Change

4.3.1 Schools will implement an evolutionary programme of changes to their promoted post structures based on the system described in this agreement. The aim is to have in place a modernised promoted post structure by August 2006 or as soon as possible thereafter. The production of a finalised promoted post structure should be seen as separate from transitional structures which is a distinct, but complementary process. This is explained in the agreement *“Transitional Arrangements for Promoted Post Structures in Schools and Educational Services Following ‘A Teaching Profession for the 21st Century’* Headteachers will consult all staff (including ancillary staff), School Boards, and the Education Authority on the overall appropriate promoted post structures.

4.3.2 Headteachers will develop management structures and phasing of implementation based on consideration of the following factors:

- The principles described at 4.1, applied at local level
- The operational requirements at 4.2
- The present arrangements
- Changes in the school roll, and therefore staffing entitlement over the next 10 years
- The effects of any known plans for the general restructuring of educational provision
- The age profile and known career intentions of staff
- Any other relevant information.

As under current arrangements the plan for revision of the management structures will be subject to consultation with staff at school level which will include consideration of any financial implications. Individuals affected by changes will be consulted on a personal basis.

4.3.3 Phase 1 – “A Teaching Profession for the 21st Century” envisages the introduction ~~of~~ new management structures from 01 August ~~2003~~2002. This will have immediate impact on this date in these areas:

- All assistant headteachers will be assimilated as deputy headteachers and their salaries will be defined in accordance with the relevant sections of “A Teaching Profession for the 21st Century” and the job-sizing exercise.
- The post of senior teacher will be removed from the promoted structure of schools. Current post-holders, unless affected by other parts of this agreement, will be automatically assimilated to scale point 3 on the Chartered Teacher scale for salary purposes.

- Schools will implement arrangements that address the service delivery issues arising from the removal of senior teacher posts and the assimilation of assistant headteachers to the depute headteacher scales.

In schools with more than one depute headteacher, one post-holder will be designated as automatically deputising for the headteacher in his or her absence. This will usually be the member of staff holding the depute's post as a permanent appointment prior to 30 June 2003. Other depute headteachers in a school will be expected to deputise for the headteacher in the absence of the headteacher and/or designated depute.

4.3.4 Phase 2 - Post holders at the current levels of assistant headteacher, depute headteacher and headteacher will continue with the duties associated with their substantive post as at 30 June 2003, unless separately negotiated on an individual basis as part of normal and routine arrangements.

Present promoted post holders who will undertake additional management duties as a result of changes to the overall structure of the school may be job-sized. This phase will be undertaken before any other changes to the management structure are enacted and will be limited to duties assimilated as a direct consequence of the disappearance of the senior teacher grade.

All holders of temporary or acting appointments as senior teachers, and assistant headteachers at 30 June 2003 will be considered to have reverted to their substantive posts by that date.

4.3.5 Phase 3 - The position of principal teachers in the organisation of primary schools is recognised with effect from 01 August 2003. It is not essential, however, for all schools to have a principal teacher.

Principal teachers exist as a middle management appointment. In the primary school context they may exist to discharge:

Vertical functions – that is having responsibility for all aspects of provision for particular year stages or departments such as P1 to P3 or P4 to P7; or
Horizontal functions – that is responsibility for particular aspects of provision such as Language, mathematics, environmental studies or expressive arts for all year stages. Or, alternatively, they could be responsible for pupil support from P1 to P7, for example. In this latter case there would be a development of the roles of behaviour support, guidance and personal and social education.

With effect from the date of this agreement senior staff below the level of headteacher will not be automatically replaced with post holders of the same grade. Instead, schools will be given the option to replace with one or more principal teachers to a level equivalent to existing management element costs. Such posts will be job sized.

As post-holders who are conserved on chartered teacher scales leave schools, it will be possible to consolidate the incremented element of their salary into promoted posts at either deputy headteacher or principal teacher level.

The ~~possibility exists~~ Authority may to create posts of principal teacher pupil support at learning partnership level. ~~In such cases the post could be supported either from the management structure of one partnership establishment, or by a pooling of managerial resources between schools.~~ If this latter option ~~is~~ was used the funding, line management reporting, discipline and grievance arrangements would have to be absolutely absolutely clear and agreed with headteachers before implementation.

4.3.6 Job-sizing

Promoted posts existing as part of the structures which will operate from 01 August 2003 will be subject to job-sizing. The toolkit for this process is presently being developed at national level. The job-sizing process and its outcomes will influence the way schools develop their management structures. Any financial implications will have to be considered carefully as will the impact on effectiveness of any emergent differences between post holders.

- 4.3.7** Once these stages are complete, headteachers will complete a schematic promoted post structure plan using the proforma at Appendix 3 and this will be submitted to the Authority for approval. Approval will depend on an evaluation of the structure based on the factors described in paragraphs 4.1 and 4.2 together with the context of 4.3.2. This process requires to be completed as soon as possible, but in any event before the end of June 2003. Consideration of the important issues within this document should be managed within the working week arrangements of the school. Discussion take place with school trades union representatives on the consultation timetable.

4.3.8 Financial Testing

The introduction of the job sizing methodology has introduced a new dimension into the way posts are graded and therefore remunerated. Without external financial guarantees, the Authority is unable to underwrite financial risks that currently cannot be quantified. All changes to the promoted post structures of individual schools must therefore be tested financially before implementation. The criterion for testing is that the change cannot result in any increased net costs beyond levels equivalent to the time of this agreement. Financial testing will be done transparently, using the methodology outlined in SNCT/24.

~~Any implications for school budgets will be reflected in the normal consultative arrangements for devolved school management.~~

5. IMPLEMENTATION

5.1 Once approved, schools may then start to move towards their planned structure. This will be achieved using the procedures separately agreed in the document *“Transitional Arrangements for Promoted Post Structures in Schools and Educational Services Following ‘A Teaching Profession for the 21st Century’ ”*.

5.2 ~~All maingrade teachers will be expected to undertake the full range of duties described in Annex B of “A Teaching Profession for the 21st Century”.~~ The duties of all grades of teacher are described in Annex B of “A Teaching Profession for the 21st Century”.

6. FACILITATION

6.1 Early retirement

The implementation of modernised management structures is unlikely to gain pace until the present promoted post holders leave the system. While this may be partially achieved through promotions to other schools, the most likely route will be retirement. Indications are that some schools will encounter substantial levels of retiral in the near future, this will not be universally the case. As conditions allow, the Authority will give consideration to early retirals from promoted post holders under existing arrangements and on the same basis as other applicants, with the exception of the conditions described in para 4.2.86.2 below.

6.2 Change fund

Should national funding become available to facilitate change under *“A Teaching Profession for the 21st Century”* then it may be possible to consider early retirements under specific arrangements. In this case applications for early retiral would be considered from promoted post-holders and would be judged against the availability of change fund resources, the need to deliver an efficient and effective service and the needs of the individual member of staff.

The use of any change funds will be the subject of discussion with the LNCT in order to establish the parameters of any early retiral scheme developed with the intention of facilitating this agreement.

57. RECOMMENDATIONS

- 7.1 It is recommended that Members agree that:
- (i) Standard Circular 66 should be amended to reflect the conditions in this agreement; and
 - (ii) the joint secretaries should circulate this paper to all educational establishments and services.

John Mulgrew
Director of Educational and Social Services

GRS/GRS
28 April 2003

Members requiring further information should contact Graham Short, Head of Schools, (01563-576089).

Appendix 1

Pages 4-5 from *“A Teaching Profession for the 21st Century”*

Appendix 2

Annex B from *“A Teaching Profession for the 21st Century”*.

Appendix 3

Promoted Post Structure Plan

School:

1. Present Promoted Post Structure

Depute Headteacher	
Assistant Headteachers	
Senior Teachers	
TOTAL	

2. Future Promoted Post Structure

	Remit Area	
Depute Headteacher		
Principal Teachers,		
TOTAL		

Please attach a wiring diagram summarising the promoted posts and line management arrangements.

Please also attach the minutes of consultation meetings that took place in relation to the development of the structure proposed in Section 2.