



# HR Core Service Specification

## Supporting your school's success.

Providing you with proactive and tailored HR, Payroll & Pensions, Safeguarding and Health & Safety support.

We listen. We support. You achieve.

Last revised: Month/Year

# HR Core Service Specification

## 1. Advice and Information

- 1.1. Telephone and email advice on HR casework and specific general HR matters to be provided by named HR Administrator, Adviser, Manager or Director, as appropriate.
- 1.2. Email advice notes including advice on national changes, model HR policies/procedures, education HR matters such as DBS changes, changes to Teachers Pay and Conditions, the Burgundy Book, the Green Book, etc.
- 1.3. Termly update meetings at various locations which provide updates on education and employment law changes, practical advice and guidance on current HR issues for School Leaders and Business Managers. Governors also welcome to attend.
- 1.4. Access to live and archived webinars on a range of HR topics on [www.epm.co.uk](http://www.epm.co.uk). This is a professional development resource for School Leaders, which is also available to Governors.
- 1.5. Access to archived advice notes on [www.epm.co.uk](http://www.epm.co.uk), including advice on relevant DfE and employment law changes, model policies/procedures and other HR matters.
- 1.6. Access to documents library on [www.epm.co.uk](http://www.epm.co.uk) of up-to-date model HR policies, procedural documents, and other documents in relation to all matters listed below.
- 1.7. Use of [www.epm.co.uk](http://www.epm.co.uk) job advert facility for teaching jobs (no charge for posting adverts).
- 1.8. Advice on the role of governors as the employer (a
- 1.9. Academy, Foundation, Voluntary Aided or Free School (or acting as the employer on behalf of the Local Authority (Community Schools).
- 1.10. Advice on employment arrangements for alternative governance models including Multi-Academy Trusts, Federations, and collaborative arrangements.

## 2. Appointments

- 2.1. Casework advice on contractual and legislative issues affecting all stages of the recruitment process.
- 2.2. Processing of HR portal instructions regarding appointments for all employees, e.g., obtaining member service prints (TR2) and cross-checking this against the application form, checking continuous service dates and sick pay dates, undertaking the Prohibition Check for teachers and emailing the result to the School, issuing Statements of Main Terms of Employment (contract), variation, extension letters, salary assessment forms, etc. to the registered portal user.
- 2.3. Access to EPM's online Disclosure and Barring Service (DBS) Portal to process DBS checks.

- 2.4. Access to EPM DBS team for queries on DBS processing.
- 2.5. Access to EPM DBS team for advice on single central record and related DBS safer recruitment issues.
- 2.6. Advice and support to the Governing Body on Headteacher recruitment.
- 2.7. Advice on NQT induction and probationary periods.
- 2.8. Model letters and employment application forms.
- 2.9. Model recruitment selection, induction and probation policies and procedures.
- 2.10. Link facility to process statutory pre-employment health screening.
- 2.11. Casework advice on all safeguarding issues relevant to appointing staff including disqualification requirements.
- 2.12. Advice notes and webinar training on recruitment and all safeguarding issues relevant to appointing staff, including disqualification requirements.

### 3. Termination of Employment

- 3.1. Processing of EPM HR portal instructions regarding termination of employment for all employees, e.g., non-renewal of fixed-term contracts, retirements, and resignations.
- 3.2. Casework advice on notice periods and terminations, including ending fixed-term contracts.
- 3.3. Casework advice and support on all stages of redundancy and restructuring procedures, redundancy payments, etc.
- 3.4. Model letters and model redundancy policy.
- 3.5. Attendance at formal redundancy hearings and appeals to advise the Headteacher or a panel of Governors.
- 3.6. Advice and support on the negotiation of Settlement Agreements.
- 3.7. Preparation of Settlement Agreements.
- 3.8. Advice notes and webinar training on termination of employment, redundancy, and restructuring.

### 4. Discipline and Dismissal

- 4.1. Casework advice and support on managing discipline through informal and formal stages of capability procedures, including suspension, gross misconduct, and breaches of Teacher Standards.
- 4.2. Casework advice and support on managing performance through the stages of capability procedures.

- 4.3. Attendance at formal disciplinary or capability hearings and appeals to advise the Headteacher or a panel of Governors.
- 4.4. Casework advice and guidance for managers conducting disciplinary investigations.
- 4.5. Model policies, procedures, and letters for each stage of the capability and disciplinary process.
- 4.6. Model Code of Conduct.
- 4.7. Advice notes and webinar training on capability, discipline and managing challenging people.

## 5. Grievance

- 5.1. Casework advice and support on the management of individual and collective grievances.
- 5.2. Casework advice and guidance for managers conducting grievance investigations.
- 5.3. Attendance at formal grievance hearings and appeals to advise the Headteacher or panel of Governors.
- 5.4. Advice notes and webinar training on the use of the grievance procedure.

## 6. Paying Staff

- 6.1. Casework advice and interpretation on STPCD, Green Book, locally agreed terms and conditions and pay for teachers and support staff.
- 6.2. Production of teacher and support staff salary assessment forms.
- 6.3. Advice on the content and application of the pay policy and the process for pay decisions.
- 6.4. Model pay policy.
- 6.5. Advice notes and webinar training on pay policy, pay review and progression, and pay disputes.

## 7. Employee Relations

- 7.1. Advice and support in relation to industrial action: how to respond, when and how to deduct pay, etc.
- 7.2. Advice and support on trade union recognition, consultation, trade union facilities time and employer obligations under TULRA.
- 7.3. Model joint consultative agreement.
- 7.4. Drafting correspondence with trade unions on matters of dispute.

- 7.5. Attendance at JCC meetings on request.
- 7.6. Advice notes and webinar training on employee relations matters.

## 8. Health, Safety & Wellbeing

- 8.1. Casework advice and support on stress at work, HSE management standards and the employer's duty of care.
- 8.2. Advice notes on employee health, safety, and wellbeing issues.

## 9. Job Description & Job Evaluations

- 9.1. Casework advice on job descriptions and job evaluation of new roles.
- 9.2. Model job descriptions.
- 9.3. Support and advice on the implementation of new JE schemes and pay line.
- 9.4. Advice notes on job descriptions and job evaluation.

## 10. Appraisal & Performance Management

- 10.1. Advice and guidance on the operation of the teacher and support staff appraisal processes.
- 10.2. Casework advice and support on managing performance concerns under the appraisal process and the transition to formal capability.
- 10.3. Model teacher and support staff appraisal policies and associated documentation.
- 10.4. Advice notes and webinar training on appraisal and performance management.

## 11. Personal Information

- 11.1. Advice on matters arising from the Employment Practices Data Protection Code.
- 11.2. Casework advice and support on the management of personal information, including providing and receiving job references and retention of personal information.
- 11.3. Advice notes on the management of personal information.

## 12. Equality & Diversity

- 12.1. Advice on all matters arising from and aspects of the Equality Act 2010, e.g., time off for religious observance and reasonable adjustments for disabled employees.
- 12.2. Advice on EHRC public sector equality duty.

- 12.3. Model policies and procedures on equality and diversity, bullying and harassment and supporting documentation.
- 12.4. Model Public Sector Equality Duty statements.
- 12.5. Casework advice and support on investigations relating to allegations of discrimination under any protected characteristic: sex, race, age, disability, pregnancy and maternity, religion or belief, marriage and civil partnership, sexual orientation and, gender reassignment.
- 12.6. Advice notes and webinar training on equality and diversity.

### 13. Family Friendly Matters

- 13.1. Casework advice and support on flexible working requests.
- 13.2. Casework advice and support on maternity leave and pay for teachers and support staff.
- 13.3. Casework advice and support on parental leave, shared parental leave and dependants care leave.
- 13.4. Casework advice and support on adoption and adoption support leave.
- 13.5. Model policies and documents on shared parental leave, adoption, and maternity, plus supporting documentation.
- 13.6. Advice notes and webinar training on family friendly matters e.g., shared parental leave.

### 14. Sickness & Other Leave of Absence

- 14.1. Casework advice and support on the application of the sickness absence management policy.
- 14.2. Casework advice and support on in-service occupational health referrals.
- 14.3. Casework advice and support on occupational health reports, phased returns, and reasonable adjustments.
- 14.4. Attendance at formal ill-health hearings and appeals to advise the Headteacher or a panel of Governors.
- 14.5. Casework advice and support on other leave of absence matters, e.g., discretionary leave of absence and time off for training.
- 14.6. Model sickness absence, discretionary leave, and time off for training policies and associated documentation.

- 14.7. Advice notes and webinar training on sickness and other leave of absence, e.g., discretionary leave.

## 15. Child Protection & Whistleblowing

- 15.1. Casework advice and support on managing allegations against staff, including LADO referrals.
- 15.2. Casework advice and support on whistleblowing complaints.
- 15.3. Attendance at strategy meetings on request.
- 15.4. Model policies on dealing with allegations against staff and whistleblowing.
- 15.5. Advice notes and webinar training on child protection and whistleblowing.

## 16. TUPE

- 16.1. Advice and support relating to out-sourcing and in-sourcing, including Transfer of Undertakings (Protection of Employment) (TUPE) and staff transferred into an Academy or Academy Trust.

## 17. School/Academy Responsibilities

- 17.1. In order for HR to provide the best service, it is necessary for customers to:
  - Use the EPM Portal for HR records
  - Provide full and accurate information regarding employee cases