



St Edmundsbury and Ipswich
Diocesan Multi Academy Trust

Premature Retirement & Redundancy Policy & Procedure

Date Approved and Minuted	MAT Board	10th May 2024
Date of Next Review	MAT Board	9 th May 2027

Premature Retirement & Redundancy Policy & Procedure

1. Purpose

The purpose of this policy is to set out for schools:

- i. who meets the costs of premature retirement and redundancy for teachers in MAT schools.
- ii. in the case of dismissal by reason of redundancy, the basic procedural requirements which the MAT Board expects governing bodies to take, to ensure that any dismissal will be regarded as fair and not, therefore, susceptible to successful appeal to an employment tribunal.

2. Policy

The MAT is the employer of all staff working within its schools. The MAT Board has a Scheme of Delegation for schools, which delegates certain functions to Local Governing Bodies and Headteachers. Such schemes are at the discretion of the MAT Board, which reserves the right to amend or remove delegated powers.

Redundancy occurs when the requirement for "work of a particular kind" at an establishment has ceased or diminished or is about to cease or diminish. Employees who are dismissed by reason of redundancy are entitled to receive compensatory payments. The amount of those payments is governed partly by statute and partly by Trust policy. In addition to a redundancy payment, any employee who is old enough to satisfy the requirements of their pension scheme may be entitled to take premature retirement and receive an immediate pension.

The capital cost of the enhanced pension contribution for early retirement costs are met from a school's budget.

The cost of redundancy pay will also be met from the school's budget.

The cost of any compensatory payments awarded to an employee by an employment tribunal (if a tribunal subsequently finds that dismissal to be unfair) will be met from the school's budget.

3. Planning

The Trust's policy requires school governing bodies to plan their staffing levels ahead, to anticipate any changes and identify where circumstances may lead to staffing reductions, especially those created by foreseeable reductions in pupil numbers. Schools have access to budget monitoring information which enables them to plan ahead for the next three years. This enables a school to take advantage of normal staff movement and adjust its staffing complement accordingly - including the distribution of promoted posts, (i.e. those within the Leadership Group or attracting Teaching and Learning Responsibility payments).

4. Procedure

As a good employer, the MAT expects that:

- i. any and every dismissal for redundancy results in an overall reduction in the total number of teaching staff at the school (and provided that there is no consequential increase in support staff);

- ii. the school has planned ahead and taken all reasonable steps to avoid redundancy as set out at Appendix A
- iii. the Trust's procedural guidance, as set out below, has been followed.
- iv. courses of action other than redundancy have been fully explored, especially where retraining or redeployment within the school could be offered.
- v. Opportunities for applying for suitable vacancies within other MAT schools have been fully explored, provided they meet the essential requirements of the role.

Appendix A sets out the procedural requirements, which in the Trust's view are necessary to ensure that the actions of a Governing Body in dismissing an employee by reason of redundancy will be deemed to be fair.

5. Process

The MAT requires schools to submit details of staffing appointments made to the CEO on the form at Appendix A in order that it can satisfy itself that all reasonable steps have been taken to avoid redundancies.

6. Advice

The MAT requires schools to seek and follow HR advice and advice from the CEO of the MAT, including officers acting on their behalf.

7. Consultation with Employees and Trade Unions

7.1 Timescale for Consultation

- 7.1.1 If a reduction in staffing appears to be unavoidable, the school must declare this to employees at the school in sufficient time to allow full consultation with school staff and representative trade unions. This is required by employment law as well as the Trust's policy and guidance. Schools are also expected to freeze recruitment (other than to temporary or strictly time-limited posts) as soon as it is apparent that staff reductions may be necessary.
- 7.1.2 Where a potential redundancy situation is identified, it is important for school management to take account of the length of time necessary to complete the process fairly. The requirement for full consultation with employees and their representative trade unions in these situations, combined with the requirement to give appropriate notice where dismissal by reason of redundancy is an outcome, will normally necessitate starting the procedure at least one and a half school terms before the staff reduction needs to take effect.

An illustrative timescale, showing the main stages of the procedure is set out at Appendix B.

7.2 Starting Consultation – Writing to Trade Unions and Staff

- 7.2.1 Consultation must start at the earliest practicable opportunity. Governing bodies will normally become aware of a need to make staffing reductions which might involve redundancy through their budget planning process. If the need becomes clear, governing bodies should inform the Trust and seek professional HR advice without delay. Initiating the procedure does not commit school management to carrying it through to completion, and it is straightforward to withdraw the notification if redundancy subsequently proves to be unnecessary or avoidable.
- 7.2.2 Formal consultation should not be pre-empted by informal discussions with staff. There should be a clear start to the consultation process. The first stage is to write a letter to the appropriate trade unions (i.e. if teachers are affected all teaching unions and, if support staff are affected, to UNISON), and to the appropriate school staff (i.e. teachers and/or support

staff). Names and addresses of trade union County Secretaries will be supplied by your named HR Consultant. The letter should contain information prescribed in Section 188 of the Trade Union and Labour Relations (Consolidation) Act 1992 - the reason for the proposals, the extent of the staff reduction, the description of employees concerned and the number of such employees at the school, the proposed method of selecting those for redundancy, the proposed dismissal procedure, the proposed method of calculating any redundancy payments (other than those required by law) and the proposed timing of any dismissals (with due regard to employees' contractual notice periods). The school's HR Consultant will provide a suitable draft, and a sample consultation letter is set out in Appendix C. Trade unions have a right to request relevant information and a list of supporting documents which trade unions normally require access to, in a redundancy situation, is given within the sample letter. These documents should, where possible, be sent out with the letter.

- 7.2.3 Any circulation of information for the purposes of consultation should also include staff who are away from the school on long term sickness, maternity leave, secondment, or any other similar temporary absence.

7.3 Holding a Meeting with Staff and Trade Unions

The initial letter should be followed up as soon as is reasonably possible by convening a staff meeting to explain the situation more fully, what has led to it and how the school is proposing to resolve it. If both teaching and support staff may be dismissed, all school staff should be invited to attend. If the situation affects only teachers or only support staff, it may be appropriate to convene a meeting of the group affected only. Representatives of recognised trade unions representing the groups of staff invited to the meeting are entitled to attend, whether or not they have members in the school, and should be invited. The headteacher will normally be the appropriate person to conduct the meeting, and they should take advice in planning it. Employees may be invited to express an interest (without any obligation) in voluntary redundancy.

7.4 Response to Representations from Trade Unions and Staff

After writing a letter to staff and trade union representatives, providing relevant information and holding a staff meeting, schools must allow time for employees and their representatives to respond to the proposals. Schools may find that trade unions wish to explore the school's staffing situation in relation to its budget, challenge proposals, put forward their own proposals to avoid redundancy or reduce the number of dismissals, or seek further clarification. Amendments to the school's original proposals might include voluntary reductions in hours, discontinuing the use of contractors, etc. The Governing Body has a duty to consider any counter proposals, or modifications to its original proposals. It should arrange for a response to be made in writing to the trade union(s) concerned, giving reasons for accepting or not accepting any amendments. Schools should be prepared for further meetings with trade union representatives if the process of consultation requires this.

7.5 Voluntary Redundancy

It is normal practice to invite employees to volunteer for dismissal before starting a process to select. Volunteers do not have to be accepted (their continuing employment may be essential to the school) but must always be carefully considered. If there are more volunteers than required, selection between volunteers may be required, using a fair process. It may be possible to accommodate a suitable volunteer by some reorganisation of the remaining staff and their duties. In such case the Trust will require schools to do their utmost to manage the process in this way.

7.6 Consultation about Selection Criteria

If the school's proposals cannot be modified to avoid redundancy, and/or it is clear that the required staffing reductions cannot be achieved by voluntary means (including where appropriate voluntary redundancy) further consultation must take place with the trade unions, in respect of the proposed criteria for the selection of those to be dismissed and how the criteria will be applied. Broad selection criteria (usually referring to the school's curricular and pastoral requirements) should already have been set out in the original consultative letter. It will now be necessary to establish in practice precisely how these will be interpreted and applied in the context of the school's future staffing needs (e.g. for experience and/or expertise in particular curricular areas). Schools should take professional HR advice in carrying out this process, to ensure that the precise criteria are developed and applied in a fair, reasonable, and acceptable manner, within the framework of discrimination legislation. Selection should not be made on the basis of any non-contractual extra-curricular activities carried out by an employee. Schools should aim to reach agreement with trade union representatives on the application of the criteria. If any disagreement cannot be resolved after consultation with trade unions, the Governing Body should be in a position to explain the rationale for the way in which it proposes to apply selection criteria.

7.7 Further information about specific selection criteria

7.7.1.1 The Trust does not normally recommend "last in first out" as a main or sole criterion but accepts its use as a subsidiary criterion where it is otherwise impossible to distinguish between employees.

7.7.1.2 The Trust will not normally utilise attendance records in a school setting. Exceptionally, should there be a case for these criteria to be utilised, current levels of attendance may be assessed when selection for redundancy is necessary. The MAT's Sickness Absence Management Policy will form the basis for assessing levels of attendance.

Attendance records will normally be taken into account on the basis of patterns over the 12 months preceding the notification to the recognised trade unions of the possible redundancies, unless a longer period is agreed to be fairer to all parties.

Absence that has been covered by medical certification will not be taken into account for the purposes of selection for redundancy, but absences which are uncertified or self-certified will count. Care must be taken to ensure that no discrimination under the Equality Act 2010 occurs: for example, sickness absence linked to pregnancy, gender reassignment and disability should not be taken into account in selection processes, and that authorised absence is excluded from the calculation, including antenatal appointments, pregnancy, maternity, paternity, adoption and parental leave.

Attendance records must not be used where all the employees within the group at risk of redundancy have very low absence records. Other selection criteria would be applied and hold greater weight in such circumstances.

7.7.1.3 The Trust will not use disciplinary records as a means of selection. Exceptionally, should this criterion be utilised, only live disciplinary warnings will be used. An assessment of the level of disciplinary action against the employee will be made to assist in determining redundancy selection alongside the other selection procedures.

7.7.1.4 Appraisal records or Performance Development Reviews will not be used as part of the selection criteria other than in a tie break situation.

8 The Process of Selection for Dismissal

8.1 The Selection Process

The selection process should be based on objective information. Schools are recommended to use a pro-forma (example included as Appendix D) to gather this information. Completed forms, with names removed, should be assessed by a selection panel, which should, so far as is possible, consist of governors who have had no substantial previous involvement with the consultation process or drawing up selection criteria. The panel should judge each form submitted in the light of the pre-determined selection criteria and agree which employee(s) meet least well the school's future requirements. At this stage the role of the Headteacher should be to advise the selection panel about the school's future requirements and in that role they should refrain from linking the anonymous forms with identified employees.

8.2 Employees who are pregnant or on maternity or family leave

Pregnant employees and those on maternity, adoption or shared parental leave must be notified of the redundancy process, invited to redundancy consultation meetings and considered for redeployment in the same way as any other employee. Pregnancy or absence on maternity or family leave must not be used as a selection criterion and if absence is used as a criteria, absences that relate directly to pregnancy or time off for dependents must be disregarded.

Employees who are selected for redundancy whilst on Statutory Maternity, Adoption or Shared Parental Leave have special rights in law, known as "primacy". For the duration of any coinciding Maternity, Adoption or Shared Parental Leave and notice periods (i.e., not during redundancy consultation, unless selection processes are occurring during the consultation), they have the right to be offered any "suitable alternative employment" in the organisation without having to go through a selection process or interview. This is even if there are other employees that might be more suitable for the job.

From 6th April 2024, the Protection from Redundancy (Pregnancy and Family Leave) Act 2023 came into effect to strengthen existing redundancy laws to protect pregnant workers and new working mothers. The Act extends the period of protection from redundancy to 18 months after the birth, and parents taking adoption or shared parental leave will also be protected while on leave and for a period of 18 months after their return. This will prohibit employers from making pregnant workers and new working mothers redundant from the point that a woman notifies them she is pregnant until six months after the end of her maternity leave, except in very limited circumstances.

Primacy does not constitute unlawful discrimination and is a legislative requirement.

8.3 "Red-circling" and "ring-fencing" of jobs

If appropriate, consider establishing a transition plan, from the existing to the new structure. This should be clear and transparent. It may provide for the following:

- "Red-circling" jobs that are effectively the same in the proposed structure as in the existing structure. Here a "match" may be taken as a job that is broadly the same in terms of grade and remit.
- Consideration may also be given to "ring fenced" selection processes, where staff may be invited to express preferences for jobs in the new structure, subject to the ring fence criteria; such applications must be assessed in an objective manner, which may include an interview process.

8.4 Communicating the Decision to Dismiss

The selection panel has the delegated power to determine that an employee shall cease to work at the school. The panel should ensure that arrangements are made to communicate that decision and the reasons for it, sensitively, to any employees who are selected. A formal meeting should be convened with the employee for that purpose at which their representative is also invited to be present. The meeting should be conducted by the headteacher and/or the chair of the selection panel, who should be in a position to describe to the employee selected, and answer questions about, the selection process and the rationale for the employee's selection. The employee should be allowed to make representations about their selection. Unless, as a result of this meeting, the panel agrees to reconsider its selection decision, the Trust will dismiss any employee who is selected to be dismissed.

8.5 Appeal Against Dismissal

An employee who is selected for dismissal must be offered the opportunity to appeal against the decision of the selection panel to a panel of governors. In practice volunteers will not wish to appeal but should still be offered the option. The appeal panel should be constituted from governors who have not had any part in the selection procedure. The panel should be conducted in the same manner as an appeal against a dismissal on the grounds of conduct or capability.

8.6 Redeployment

The Governing Body's responsibilities do not end with a determination which results in dismissal. There is a continuing responsibility to attempt to redeploy the employee selected. In the first instance the school must consider any vacancy created by normal staff turnover, if necessary with suitable training for the employee. The Trust will also use its best endeavours to bring the employee to the notice of other schools within the Trust which have suitable vacancies.

There is no strict definition as to what is or is not suitable alternative employment. However, there will be a presumption that a job is suitable where the alternative post:

- Requires broadly similar skills and knowledge as those required of the redundant post, even if some degree of training or familiarisation is required.

8.6.1 Trial Periods

An employee who accepts an offer of alternative employment will be given a minimum trial period of four weeks, (or such longer period as may be agreed with the school) to give them an opportunity to assess its suitability. Before the trial commences, objectives for this period and any training or support that is required, should be identified in discussion with the employee.

If, at the end of that trial period, the employee decides that they do not wish to accept the position permanently then they will not lose any entitlement to redundancy payments or early retirement unless, in the opinion of the Trust, the employee has unreasonably refused to continue with that job.

The Trust may also terminate a trial period if it believes that the employee's performance in that role is inadequate. The employee will not be entitled to redundancy payments or early retirement unless the Trust is satisfied that the job was unsuitable for them, taking into account the skills and experience that they possess and after considering the availability of training.

8.7 Financial Arrangements

Employees will be provided with an estimate of their redundancy pay and any other severance payments, on request. An employee who unreasonably refuses the Trust's offer of suitable alternative employment will not be entitled to the redundancy benefits.

8.7.1 Redundancy Pay

The amount of **statutory** redundancy pay to which an employee is entitled depends on their age, length of service and pay. The entitlement is:

- Half a week's pay for each complete year of service up to age 21;
- One week's pay for each complete year of service between ages 22 and 40;
- One and a half weeks' pay for each complete year of service after age 41.

The maximum length of service taken into account to calculate a redundancy payment is 20 continuous years. An employee must have at least 2 continuous years of service to be entitled to a redundancy payment.

For the **statutory** redundancy payment, a week's pay is capped at the statutory maximum, which is increased in April each year. (current rates are published on www.gov.uk)

Teachers (Compensation for Redundancy and Premature Retirement) Regulations allow a severance payment (which includes any statutory entitlement to a redundancy payment) to be calculated on the basis of an actual week's pay, where this is greater than the maximum allowed for statutory redundancy pay.

Appendix A

PROPOSAL TO REDUCE ESTABLISHMENT BY REASON OF REDUNDANCY

Name of School

Headteacher's name

Chair of Governors' name

The Diocesan MAT requires schools to submit details of all actions and measures taken to reduce staffing costs, and thereby mitigate the risk of compulsory redundancies. This is so that the MAT can satisfy itself that the school has taken all reasonable steps.

Please complete as fully as possible

Without any staffing reductions, what are the Year End financial predictions?						
Year ending		In year position	Carry-forward reserves	Pupil number predictions /planned places for special schools	Comments	
Year1	March 20__	£	£			
Year 2	March 20__	£	£			
Year 3	March 20__	£	£			
Year 4	March 20__	£	£			
Year 5	March 20__	£	£			

What has led to the current financial difficulty?	
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WHAT ACTION HAS BEEN TAKEN TO MANAGE THE SITUATION?

When was this issue identified?	
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Detail briefly what savings have already been implemented? (more detailed information about different ways the school's sought to make savings will be required in subsequent sections of this template)	
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Do you have any flexible, temporary or other fixed term contracts from which you can make savings? (Provide details)	
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Post title (do not include names of individual employees) Add more rows as appropriate	Details of contract (type, length, grade including spinal column point etc)	Likely Saving

What other opportunities are there to make savings from staffing or other costs? For example, likely or confirmed retirements, resignations, requests for reduced hours, decision not to return from maternity leave or other natural wastage.			
Post title (do not include names of individual employees) Add more rows as appropriate	If this is not a confirmed change, what is it dependent on?	Likely saving	
Other possible savings:			
Similarly, what consideration has been given to alternative provision for, for example, supply cover, bought in services, etc?			

Detail all the appointments made at the school in last two years (please add move rows if required)	Date appointed	Full year salary costs (both with and without on costs)	Part year salary costs (both with and without on costs) i.e. up until possible date of redundancy	Subject/ Specialism
Permanent teaching staff (do not include names of individual employees)				
Person 1				
Person 2(add more rows as appropriate)				
Permanent support staff (do not include names of individual employees)				
Person 1				
Person 2 (add more rows as appropriate)				
Temporary teaching (do not include names of individual employees)				
Person 1				
Person 2 (add more rows as appropriate)				
Temporary support staff (do not include names of individual employees)				
Person 1				
Person 2 (add more rows as appropriate)				

	Please indicate 'none' or give more details	Effective date of any changes made	Annual cost of any changes made
What increases have been made to salaries or allowances in the last two years, <u>other than</u> single point incremental increases or threshold applications?			
Headteacher Group			

Headteacher Range within Group			
Leadership posts			
Upper Pay Range			
Main Pay Range			
Unqualified/Instructor Pay Range			
Support Staff			
Total additional costs (excluding single point incremental increases or threshold applications)			£

Please give anonymised details of leavers over the last 12 months

Job title (add more rows as appropriate)	Date left	Was the employee replaced? (yes / no, if yes, please explain why)	Total saving (if the employee was not replaced)
Total costs on replacing leavers in the last 12 months			

Please give details of your current and your proposed FTE for both teaching and support staff

Current FTE: teaching staff	
Current FTE: support staff	
Proposed FTE: teaching staff	
Proposed FTE: support staff	
FTE reduction to teaching staff	
FTE reduction to support staff	
Total FTE reduction	

Please detail the redundancies planned, their total cost (capitalised) and the savings be to achieved:		
Number (fte) and type of posts it is proposed will be made redundant (please add more rows as appropriate)	Total likely cost of redundancies (capitalised). Further advice on estimating these costs is available from your HR Advisor	Estimated Annual saving (based on average salary costs for affected posts)

Signature Headteacher Date.....

Signature Chair of Governors..... Date

Please return the completed template, along with copies of any supporting documents to:

CEO

Diocesan MAT

St Nicholas Centre

4 Cutler Street

Ipswich

IP1 1UQ

Appendix B

Illustrative timescales for August 31 staff reduction

	<i>Action</i>	<i>Last practicable date</i>
1.	Initial letter of consultation	Before February half term
2.	Freeze recruitment to vacancies (if not already done)	Before February half term
3.	Staff meeting – invite expressions of interest in voluntary redundancy	Before end February
4.	Consideration of responses to the initial letter of consultation – provide more information where required and respond in writing to substantive counter proposals. Modify proposals if appropriate	End of March
5.	Deadline for voluntary applications to be submitted	End of March
6.	Assess voluntary applications and respond with offers if appropriate. Review whether the requirements to reduce staff can be met by voluntary means	First week in April
7.	If insufficient firm volunteers, send (precise) selection criteria to trade unions	First week in April (depending on timing of the Easter break)
8.	Respond to observations/representation from trade unions about selection criteria. Finalize criteria. Issue pro forma to all staff who need to complete it	Third week of April (Allow time for response which accommodates the Easter break)
9.	Return of completed selection forms – selection committee meets to make its decision	First week in May
10.	Selection made and communicated – meeting with any employee selected – Trust carries out dismissal (latest date for giving notice of dismissal 31 May)	Second week in May
11.	Monitor school staffing situation and look for alternatives for redeployment in the light of late staff changes	Ongoing to end of Summer Term
12.	Appeal committee hears any appeals	ASAP after half term break
13.	Dismissals take effect	31 August

Sample letter of consultation

Addressees: county secretaries of all teachers' trade unions and UNISON (names and addresses available from HR).

Dear

Proposal to carry out dismissals of [teaching and/or support] staff by reason of redundancy

I regret to inform you that the Governing body of [name] School has resolved to reduce the number of [teaching/support] posts at the school with effect from [date e.g. 1 September 200-]. I am writing to provide you with the information specified in Section 188 of the Trade Union and Labour Relations (Consolidation) Act 1992 in order to start the process of consultation on this proposal.

The reason for this proposal is [set out the changes e.g. in pupil roll, budget etc which give rise to the proposal – give as much detail as you reasonably can]. I enclose copies of:

[The trade unions normally ask for the following information:

- Current year's budget, carry forward, reserves, renewals (Table 4 additional income, virements);
- Next year's proposed budget (as available);
- Pupil numbers in each year group for the last two years and projected numbers in each year group for next three years;
- Group/class sizes;
- Curriculum audit (current and projected);
- Average salary (with on-costs) for relevant staff in current year and projections for next year if all existing staff are retained;
- Details of vacancies;
- Budget effect of discretionary pay rises recent years.]

There is still a possibility that the situation described may be alleviated by normal staff movement or by other means, but if that does not happen, the governing body will be obliged to carry out the proposal.

It is proposed to dismiss up to [x teachers/support staff] out of a total of [y teachers/support staff] employed at the school.

Selection of the [teachers/support staff] to be dismissed will be made with due regard to the requirements of the school to maintain a balanced and effective [teaching/work] force capable of carrying out the management and organisation of the school's activities and fulfilling the curricular and pastoral requirements of the school.

The Governing Body will assess how best the school's objectives can be met with a reduced [teaching/support] staff. It will assess the school's need to retain experienced senior staff to manage the school, direct its activities and develop its curriculum. It will also assess the school's need to retain a proper balance of qualified and experienced [teachers/support staff] to deliver the curriculum across the age range and subject specialisms within the school.

Volunteers will be invited to offer themselves for selection and will be considered in the light of whether or not their leaving would meet the school's needs, either directly or indirectly, in conjunction with the redeployment of other staff within the school.

If selection is necessary, the governors will send you more detailed proposals for selection criteria during the period of consultation. Both in considering volunteers and in making and selection for dismissal, the governors will consider the qualifications and experience of [teachers/support staff] and select for dismissal those whose qualifications and experience correspond least well with the school's future requirements.

In the event that insufficient distinction between staff can be made on these criteria, the governors will select from among those whose qualifications and experience match the school's future requirements least well those with the shortest length of continuous serve. In this case breaks in service of five years or less for maternity reasons will be disregarded.

The Trust will dismiss any staff selected for dismissal. Any staff chosen to be dismissed will have a right of appeal to the Appeal Committee of the Governing Body.

Yours sincerely

Name

Position

Example Selection Criteria - Teaching Staff

When completing this form please:

- Give as much information as possible for the Personnel Committee to consider, continuing a separate sheet if necessary.
- Ensure the answers provided are relevant to the Job and Person Specification(s) you are being considered for.
- Remember that this form will be made anonymous before it is considered by the Personnel Committee. This means that they will not have any personal information about you, other than what is contained in this form.

The following are example, generic criteria, and are not meant as an exhaustive list. In addition to those listed below, schools may want to set more definitive criteria that are appropriate to their school and/or in line with specific Job and person specifications.

If you would like any assistance in completing the form, please contact [insert name / post]

This form must be returned to the Headteacher, not later than [insert date]

To be complete by individual member of staff	Personnel Committee Use
Qualification and Training	
Qualified Teacher Status (QTS) Yes <input type="checkbox"/> No <input type="checkbox"/> (Tick as appropriate)	
List any further professional or formal qualifications that you hold, e.g. higher degrees or specialist teaching qualifications)	
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Teaching age ranges

What age ranges do you currently teach (indicate proportion of time devoted to each if appropriate and length of experience with this/these age ranges)

Experience with other age ranges (indicate when, length of experience, giving dates where possible)

Do you have experience of teaching mixed age groups? If so, please provide further details and give dates where possible.

Specialist subject knowledge/experience

Indicate areas of the curriculum where you have specialist interest and/or recognised expertise

Curriculum responsibilities	
Indicate areas of special responsibility and whether you receive a TLR or SEN payment	
Whole school responsibilities	
State any whole school roles / responsibilities / tasks you have undertaken, e.g. membership of the leadership team, NQT coordinator, cross-curricular coordinator (giving dates where possible)	
Indicate any pastoral or other whole school responsibility not covered above (giving dates where possible)	
Training, CPD and other relevant professional qualifications	
List recent CPD, secondments, acting up, temporary responsibilities etc, given dates where possible.	

In the event of a tie break, the following desirable criteria will be evaluated:

List any other formal qualifications that you hold, e.g. SEN, EAL etc	
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Please return this form to [insert name]:

If a tie break situation still exists after all the above criteria have been considered, then consideration will be given to:

- Length of service

If this doesn't resolve the tie break, there will be further discussion with HR, which may include consideration of:

- Attendance record (with reference to any Equality Act 2010 provision)
- Disciplinary record
- Appraisal and performance reviews

All selection criteria will be applied in accordance with the Trust's commitment to diversity and inclusion and will not discriminate on the grounds of disability, gender, race, colour, ethnic origin, religion, faith, beliefs, culture, nationality, age, sexuality, family circumstances, socio-economic status and trade union membership or non-membership.

Example Selection Criteria - Support Staff

When completing this form please:

- Give as much information as possible for the Personnel Committee to consider, continuing a separate sheet if necessary.
- Ensure the answers provided are relevant to the Job and Person Specification(s) you are being considered for.
- Remember that this form will be made anonymous before it is considered by the Personnel Committee. This means that they will not have any personal information about you, other than what is contained in this form.

The following are example, generic criteria, and are not meant as an exhaustive list. In addition to those listed below, schools may want to set more definitive criteria that are appropriate to their school and/or in line with specific Job and person specifications.

If you would like any assistance in completing the form, please contact [insert name / post].

This form must be returned to the Headteacher, not later than [date]

To be complete by individual member of staff	Personnel Committee Use
Qualifications, Training & Experience	
List all relevant qualifications that you hold (these will be dependent on what's included in the job and person profile for your role)	
List all relevant, recent CPD, secondments, temporary responsibilities etc., giving dates where possible	
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Give examples of how you have applied that training/experience (listed above) to your role, i.e. in the classroom

List how your skills and experience compliment those required in the job description

Mental Skills

Give examples of the research and planning you have to undertake as part of your job, e.g. financial regulations, Health & safety, planning of school trips etc.

Give examples of how you organise your workload and priorities, including examples of non-routine tasks and working collaboratively with others

Interpersonal & Communications Skills

Do you have line management responsibility? If yes, please give details

Have you trained other colleagues, including informal training and coaching/mentoring? If yes, please give details

Explain what support you have provided to the school by undertaking tasks and responsibilities not directly required by your job.

Physical Skills	
Give examples of the ICT programmes you use as part of your job, including the age groups you work with	
Give examples of the equipment/tools you use as part of your job	

Please return this form to [insert name]:

If a tie break situation exists after all the above criteria have been considered, then consideration will be given to:

- Length of service

If this doesn't resolve the tie break, there will be further discussion with HR, which may include consideration of:

- Attendance record (with reference to any Equality Act 2010 Provision)
- Disciplinary record
- Appraisal and Performance reviews

All selection criteria will be applied in accordance with the Trust's commitment to diversity and inclusion and will not discriminate on the grounds of disability, gender, race, colour, ethnic origin, religion, faith, beliefs, culture, nationality, age, sexuality, family circumstances, socio-economic status and trade union membership or non-membership.