

**Document Control Sheet**

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## HR Consultancy Service Specification

### **SERVICE SPECIFICATION**

This specification sets out the service we provide to our service users and what needs to be in place to ensure we can deliver this service to the service user. Our HR service provides extensive, practical, cost-effective solutions to meet schools' needs. Competitively-priced, our service offers a supportive partnership with the shared objective of maximising schools' effectiveness and pupils' achievement. Our HR team has extensive experience of dealing with a wide range of HR issues and interventions with schools, and is able to provide holistic and flexible HR support to meet your school's needs.

Key services provided within our HR Consultancy service are:

- 1. Unlimited use of our HR Advice Helpline – Responding to queries at the first point of contact through provision of an HR Duty System.**
  - 2. Access to HR Template documents, guidance, policies and procedures and frequently asked questions.**
  - 3. A named HR Consultant service to support school leaders with complex casework and HR Topics**
  - 4. Access to use of an online staff wellbeing survey and HR support with action plan and analysis of result.**
  - 5. HR Consultant delivering bitesize HR Training sessions at your school location or to a cluster of schools.**
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- 1. The unlimited use of the HR Advice Helpline service provides both first tier and specialist knowledge and advice on a range of HR topics including:**
    - 1.1. The HR Advice Helpline service will provide advice and guidance and if required managed risk options for the school leaders to make the decision on which option/course of action they wish to make.
    - 1.2. Recruitment and appointments processes including the use of various types of contracts; appropriate salary ranges; the exercise of governing bodies'

discretions in pay determination; advice on drawing up a school pay policy; provide template single status job descriptions and person specifications

- 1.3. Performance Management including general advice on the appropriateness of the formal procedures to individual cases including conduct, capability, attendance, performance management and reward processes; advice about conducting investigations, the preparation of a case and content of letters
- 1.4. Immediate advice in cases of allegations of misconduct, including advice about suspension where appropriate
- 1.5. Employee complaints, including formal grievances and allegations of harassment and bullying
- 1.6. Advice on managing change, including making variations to contracts, and managing staff reductions and formal redundancy processes
- 1.7. Employee exits, including retirements and resignations
- 1.8. Advice on managing allegations involving child protection, including referral to Safeguarding policies and procedures
- 1.9. Advice on conditions of service for teaching and support staff, including working time, sickness, maternity, paternity, adoption leave, etc
- 1.10. Advice on the use of HR policies and procedures
- 1.11. Advice in collective disputes involving trades unions at a school (where a formal meeting is required, an HR Consultant will attend where necessary)
- 1.12. Advice on employment law and good practice, particularly in respect of equal opportunities, time off for trade union and public duties, working time regulations, leave of absence

## **2. Access to HR Template documents, guidance, policies and procedures and frequently asked questions.**

- 2.1 Via the Schools Choice Online Portal, you can access a wide range of template documents to support you with managing your employee relations cases.
- 2.3 A number of the key HR Policies and Procedures are available in easy to use toolboxes with everything available at a click of a button to download and use.

- 2.4 HR Consultants can review any drafted letters, documents before sending out to employees.

**3. A named HR Consultant service to support school leaders with complex Casework and HR Topics.**

Our objective is to deliver an effective employee relations service that meets the needs of both the school and its employees. The consultant will provide advice and guidance and if required managed risk options for the school leaders to make the decision on which option/course of action they wish to make.

- 3.1. Your named HR Consultant will arrange an annual HR Strategic meeting at the start of each academic year to update you on any changes to HR policies or Procedures, and assist you plan your strategic HR needs over the next year. Additional visits can be requested to review the HR Strategic Plan as required.
- 3.2. Casework advice and support relating to discipline/conduct, grievance, capability, harassment and ill-health cases, including advice and support in handling investigations, preparation of a case and drafting or reviewing letters
- 3.3. Provide advice and support regarding managing absence in line with your absence management policy and absence data that you hold
- 3.4. Advice on the use of mediation to resolve employee complaints, click [here](#) for further information.
- 3.5. Attendance at any formal hearing, including where dismissal may be an outcome, and providing procedural and technical advice on the conduct of the hearing
- 3.6. Advice and support in managing staffing reductions, including compliance with organisational and statutory duties and attendance at meetings of committees in connection with any selection for dismissal
- 3.7. Attendance at formal consultative meetings with employees and trades union representatives
- 3.8. Provide template letters and reviewing drafts of letters to employees and trades union representatives

- 3.9. Advice and support to governing bodies in the event of a claim to an Employment Tribunal by an employee who has been dismissed, where the school has followed HR casework advice
  - 3.10. Provision of information to individual employees about possible amounts of compensatory benefits which might be available to them in cases of redundancy and/or premature retirement
  - 3.11. Access to legal advice (quoted and charged for separately depending on complexity and requirements)
  - 3.12. Advice about performance management processes and pay decisions for all staff
  - 3.13. Review and development of employee terms and conditions and employment policies to ensure compliance with relevant legislation, best practice and statutory guidance
  - 3.14. Provision of employee relations support on client projects such as restructuring and TUPE
  - 3.15. Advice on employment law and good employment practice, particularly in respect of equality of opportunity, time off for trade union and public duties, work time regulations, and leave of absence
  - 3.16. Support and advice in collective disputes involving trades unions at the school, including attendance at formal meetings where appropriate
  - 3.17. Advice on a range of diversity issues
- 4. Access to use of an online staff wellbeing survey and HR support with action plan and analysis of result.**
- 4.1 Our HR Consultancy team have developed an employee wellbeing survey that can be emailed out to all staff for them to complete confidentially at a time that the school requests this to be undertaken and as many times as you would like.
  - 4.2 The results of the survey are collated in an easy to use word report format for SLT and governors to review.

4.3 The HR Consultancy Team, can provide HR advice and support and recommendations in relation to an action plan in relation to the results

**5. HR Consultant delivering bitesize HR Training sessions at your school location or to a cluster of schools.**

5.1 The number of training sessions to be delivered will be dependent on the number of days purchased for academies and their requirements. LA Schools can choose one session each academic year.

5.2 The following Bitesize HR Topics are currently available based on current needs identified (further details of course content covered is available on Schools Choice Portal or from your HR Consultant or HR Advice Helpline).

- Managing Absence - sickness and non-sickness
- Performance Management and Capability Procedures
- Managing honest conversations
- Managing Misconduct informally to avoid Formal Procedures
- Disciplinary Procedure
- Managing grievances/complaints informally to avoid formal procedures
- Understanding and use of Employment Terms and Conditions

5.3 It is important that as well as adopting the HR employment policies and procedures, senior leadership team and line managers are trained in how to manage employees within these policies.

5.4 An experienced and qualified HR Consultant will deliver your chosen bitesize training on your school site, we would recommend a minimum of 6 participants and maximum of 20 (depending on venue size) to get the most out of the training, it may be smaller primary schools within their cluster could share the training sessions between them.

5.5 The sessions will normally last approximately 2 hours in duration, and can be delivered at a time and date to suit you. We would encourage you to book the sessions in yours and the HR Consultants calendars as soon as possible. Please note depending on the HR Topic and availability may depend on which of our HR Consultants deliver the training, it may not be your named HR Consultant.

5.6 It may be that the HR Consultants Identify a need within schools and request that others join sessions to make the most of the training and time of the HR Consultants.

- 5.7 All participants who complete the training will receive a certificate of attendance on completion of returning an online feedback form, towards their CPD.

## **6. WHAT WE NEED FROM SERVICE USERS TO PROVIDE THE SERVICE**

- 6.1 In order that your needs are met in an appropriate and timely manner we would ask that you involve and engage with your HR Consultant at an early stage in any new casework to help supporting matters informally wherever possible.
- 6.2 The service user will appoint a named person, who will be the main point of contact in relation to seeking advice on HR employee matters.
- 6.3 You will provide us with all the relevant information outlined in Appendix 1 at our initial fact-finding meeting and in electronic format.
- 6.4 The service user will disclose all relevant information to the consultant dealing with the case and give a full and open account of all the circumstances surrounding the case or collective dispute to enable the most appropriate support and advice to be given.
- 6.5 The service user will endeavour to meet the required policy deadlines and make necessary arrangements for meetings and notetakers as applicable.
- 6.6 We will always treat you with respect and courtesy and ask that you do the same.

## **7. SERVICE EXCLUSIONS**

- 7.1 Undertaking of investigations, as this is the responsibility of the school. HR will provide technical and procedural advice and can support the investigator throughout the process to build understanding and capacity. We also offer an Investigating Officer Service; which schools can use on a 'pay as you use' basis. (Please see separate service description [here](#).)
- 7.2 Undertaking mediation. We offer a mediation service as a separate service, which schools can use on a 'pay as you use' basis. (Please see separate service description [here](#).)
- 7.3 Attendance at selection interviews. Schools have the delegated authority to make their own selection decisions. General advice about advertising is available from the Advertising Team. Advice about job descriptions,

contracts and conditions of service is available from the Schools' Choice HR Duty Office.

- 7.4 Undertaking of comprehensive support staff structure reviews; this is the responsibility of the school.
- 7.5 Advice on the substantive aspects of teachers' professional competence or management of the curriculum.
- 7.6 Legal advice. As per 3.11 above, access can be provided but this will be quoted and charged for separately depending on complexity and requirements.
- 7.7 Advice in relation to any self-employed or third-party contractors.
- 7.8 Provision of legal indemnity insurance against any potential employment tribunal claim.
- 7.9 If an HR Consultant was required to be a witness/provide a statement as part of a tribunal claim, this would incur additional charges if the amount of days purchased had been exceeded.
- 7.10 Bespoke training required by individual schools, that is not covered in the list outlined in 5.2, this will be quoted and charged for separately.

## **8. SERVICE AVAILABILITY**

- 8.1 The service operating hours and Monday to Thursday 8.30am – 5.00pm and Friday 8.30am to 4.30pm with email facility out of hours. You can email [hrcaseworkteam@schoolschoice.org](mailto:hrcaseworkteam@schoolschoice.org) and your query will be dealt with the next available working day.
- 8.2 If the Customer requests that the Service is supplied outside of the times set out in paragraph 8.1, out of hours charges may apply

## **9. SERVICE LEVELS AND STANDARDS**

- 9.1 The following response times will apply in respect of Customer enquiries relating to the Service:

<b>COMMUNICATION</b>	<b>RESPONSE TIME</b>
Letter	Within five Business Days of receipt;
Email	Within three Business Days of receipt;
Telephone	If made within the times referred to in paragraph 5.1, calls will be answered within a timely manner or forwarded to voicemail;
Telephone Voicemail Message	Within two Business Days of receipt of the voicemail;
Out of Office due to planned absence	If you receive an out of office message from any of our HR Consultants or HR Advisors, you will be asked to seek advice from our HR Advice helpline who will be able to support you due to comprehensive notes and handovers in place.

- 9.2 Our HR Consultancy team is made up of qualified and experienced HR professionals who can provide technical and specialised advice and support to school leaders in a broad variety of situations.
- 9.3 All HR Advisors and Consultants attend regular safeguarding training.
- 9.4 The HR duty caseworker service will not be available for a maximum of 9 days in any one academic year to allow for essential training and development and team meetings of the HR team. Dates will be published, and schools will be reminded nearer the time.
- 9.5 A typical HR Consultancy day is 6.5 hours, we do not charge for travel for the termly HR Strategic meetings, additional support on site visit travel expenses would be chargeable.

If your days are not prescribed as part of your contract, we reserve the right to charge additionally if your days exceed 6 days.

**10. MONITORING SUCCESS**

- 10.1 To monitor the success of the Service, representatives of Schools' Choice and the Customer shall:
  - Seek feedback during the term of the Service; and
  - conduct an annual review of the Service.

**APPENDIX 1**

List of required information to support – This is not an exhaustive list.

<b>ITEM</b>
Teachers Terms and Conditions
Support Staff Terms and Conditions
Example of your Contract Letter
Example of your Offer Letter
Absence Management Policy and Procedure
Special Leave of Absence Policy
Performance Management/Capability Policy and Procedure
Disciplinary Procedure
Grievance Procedure
Bullying and Harassment Procedure
Pay Policy including decisions regarding pay award
Sick Pay Entitlement
Probationary Period Procedure
Redundancy Policy/Guidance