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# Headteacher Annual Salary Assessment

Guide for Chairs of Governors

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## Headteacher Annual Salary Assessment

This document provides information for the Chair of Governors and the Governing Body regarding Headteacher pay for 2023/24 and the associated salary assessment form.

Set out in the following pages is advice and guidance taken from the School Teachers' Pay and Conditions Document 2023, which will remain relevant for 2023/24.

The pay award for teachers for the year 2023/24 is for an increase to all teachers' pay ranges, advisory points, and allowances of 6.5% with a higher increase on some Main Scale points, to achieve the minimum starting salary of £30,000 with effect from 1 September 2023.

Further advice and guidance is also available in the Model Whole School Pay Policy 2023/24 which can be found on the EPM website ([www.epm.co.uk](http://www.epm.co.uk)).

Trustees are entitled to have access to the [EPM website](http://www.epm.co.uk) using the School's website username and password, which can be obtained from the Headteacher.

If you require further information and/or advice or wish to discuss a specific issue on this matter, please contact the relevant Lead HR Partner, HR Partner or HR Adviser assigned to support your School.

Alternatively, you can contact one of our Senior HR Partners whose details are listed below:

### 1. Senior HR Partner Details

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### 2. Advice and Guidance for Chairs of Governors on the Salaries of Headteachers in accordance with the STPCD 2023

(With additional information regarding other members of the Leadership Group)

The Department for Education (DfE) has published the full text of the School Teachers' Pay and Conditions Document 2023 (STPCD). You can access a copy of the STPCD 2023 on the [EPM website](http://www.epm.co.uk). The information covering the sections of the STPCD for the Headteacher, and the Leadership Group is set out below for ease of reference.

### 3. Pay - General

From 1 September 2023:

- A 6.5% uplift has been applied to all teachers' pay ranges, advisory points and allowances for teachers and leaders with effect from 1 September 2023
- A higher increase on M1, to achieve the minimum starting salary of £30,000 with effect from 1 September 2023.

The following are relevant extracts from the STPCD 2023.

### 4. Leadership Group Pay Range 2023 - Annual Salary

	England and Wales (excluding the London Area) £	Inner London Area £	Outer London Area £	Fringe Area £
<b>Minimum</b>	47,185	56,100	50,929	48,484
<b>Maximum</b>	131,056	139,891	134,765	132,352

### 5. Determination of the School's Headteacher Group

5.1. The relevant body must assign its school to a headteacher group for the purposes of paragraphs 9 and 11 in accordance with this paragraph and paragraphs 6, 7, 8 and 9.

5.2. A school must be assigned to a headteacher group whenever the relevant body sees fit.

5.3. The Headteacher groups, and pay ranges in relation thereto, are as follows:

Headteacher Group	England and Wales (excluding the London Area) (£)	Inner London Area (£)	Outer London Area (£)	Fringe Area (£)
<b>Group 1</b>	53,380 - 71,019	62,304 - 79,856	57,124 - 74,730	54,685 - 72,311
<b>Group 2</b>	56,082 - 76,430	65,007 - 85,267	59,826 - 80,142	57,383 - 77,730
<b>Group 3</b>	60,488 - 82,257	69,407 - 91,095	64,229 - 85,965	61,789 - 83,554
<b>Group 4</b>	65,010 - 88,530	73,933 - 97,359	68,749 - 92,234	66,316 - 89,818
<b>Group 5</b>	71,729 - 97,639	80,655 - 106,476	75,478 - 101,350	73,034 - 98,935
<b>Group 6</b>	77,195 - 97,639	86,119 - 116,535	80,944 - 111,406	78,034 - 108,995
<b>Group 7</b>	83,081 - 118,732	92,007 - 127,564	86,826 - 122,437	84,391 - 120,021
<b>Group 8</b>	91,633 - 131,056	100,552 - 139,891	95,377 - 134,765	92,933 - 132,352

## 6. Unit Totals and Headteacher Groups - Ordinary Schools

6.1. Subject to paragraph 8 an ordinary school must be assigned to a headteacher group in accordance with the following table by reference to its total unit score calculated in accordance with paragraphs 6.1 to 6.5:

Total Unit Score	Group
Up to 1,000	1
1,001 to 2,200	2
2,201 to 3,500	3
3,501 to 5,000	4
5,001 to 7,500	5
7,501 to 11,000	6
11,001 to 17,000	7
17,001 and over	8

6.2. Subject to paragraphs 6.3 to 6.5, the total unit score must be determined in accordance with the number of pupils on the school register, calculated as follows:

Key Stage	Units per pupil
For each pupil in the preliminary stage and each pupil in the first or second key stage	7
For each pupil in the third key stage	9
For each pupil in the fourth key stage	11
For each pupil in the fifth key stage	13

6.3. The number of pupils on the school register, and the number of pupils at each key stage, must be determined by the numbers as shown on the most recent return of the Department for Education (DfE) School Census submitted to the DfE on behalf of the School.

6.4. Each pupil with a statement of special educational needs (SEN) or from September 2014 an Education, Health and Care (EHC) plan must, if in a special class consisting wholly or mainly of such pupil, be counted as three units more than the pupil would otherwise be counted as by virtue of paragraph 6.2, and, if not in such a special class, be counted as three such units only where the relevant body so determines.

- 6.5. Each pupil who attends for no more than half a day on each day for which the pupil attends the School must be counted as half as many units as the pupil would otherwise be counted as under paragraphs 6.2 or 6.4.
- 6.6. Where the Headteacher is appointed as headteacher of more than one school on a permanent basis, the relevant body of the Headteacher's original school or, under the collaboration Regulations, the collaborating body must calculate the Headteacher group by combining the unit score of all the schools for which the Headteacher is responsible to arrive at a total unit score, which then determines the Headteacher group.

## 7. Unit Totals and Headteacher Groups - Special Schools

The following paragraph 7 is only relevant to Special Schools.

- 7.1. Subject to paragraph 8, a special school must be assigned to a headteacher group in accordance with the following table by reference to its modified total unit score calculated in accordance with paragraphs 7.2 to 7.8:

Modified Total Unit Score	Group
Up to 2,200	2
2,201 to 3,500	3
3,501 to 5,000	4
5,001 to 7,500	5
7,501 to 11,000	6
11,001 to 17,000	7
17,001 and over	8

- 7.2. The relevant body must calculate the proportion of staff to pupils at the school expressed as a percentage ("the staff-pupil ratio") in accordance with the following formula:

$$\frac{A}{B} \times 100$$

where A is the number of teachers and support staff weighted as provided in paragraph 7.3, and B is the number of pupils at the school weighted as provided in paragraph 7.4.

- 7.3. The weighting for a teacher is two units for each full-time equivalent teacher, and the weighting for each support staff member is one unit for each full-time equivalent individual.
- 7.4. The weighting for a full-time pupil is one unit and the weighting for a part-time pupil is half a unit.
- 7.5. The relevant body must calculate the staff-pupil ratio modifier in accordance with the following table by reference to the staff-pupil ratio determined in accordance with paragraphs 7.2 to 7.4:

Staff-pupil Ratio	Staff-pupil Ratio Modifier
1 - 20%	1
21 - 35%	2
36 - 50%	3
51 - 65%	4
66 - 80%	5
81% or more	6

7.6. The relevant body must determine the School's total unit score in accordance with the number of pupils on the school register calculated as follows:

Key Stage (KS)	Units Per Pupil
For each pupil in the preliminary stage and each pupil in the first or second key stage	10
For each pupil in the third key stage	12
For each pupil in the fourth key stage	14
For each pupil in the fifth key stage	16

7.7. The relevant body must determine the School's modified total unit score by multiplying the School's total unit score determined under paragraph 7.6 by the staff-pupil ratio modifier calculated under paragraph 7.5.

7.8. In this paragraph:

- a. the number of pupils on the school register must be determined by the numbers as shown on the most recent return of the DfE School Census or the most recently available Welsh Government Annual School Census submitted to the DfE or Welsh Government respectively on behalf of the School; and
- b. "support staff member" means an employee who is not:
  - i. a teacher
  - ii. a person employed in connection with the provision of meals
  - iii. a person employed in connection with the security or maintenance of the school premises or
  - iv. a person employed in a residential school to supervise and care for pupils out of school hours.

7.9. Where the Headteacher is appointed as headteacher of more than one school on a permanent basis, the relevant body of the Headteacher's original school or, under

the Collaboration Regulations, the collaborating body must calculate the Headteacher group by combining the unit score of all the schools for which the Headteacher is responsible to arrive at a total unit score, which then determines the Headteacher group.

## **8. Unit Totals and Headteacher Groups - Particular Cases**

Expected changes in number of registered pupils and teaching establishments.

- 8.1. Subject to paragraph 8.2, where in the case of an ordinary school the total unit score and in the case of a special school the modified total unit score is expected by the relevant body to rise or fall after the date to which the assignment refers, the relevant body may instead assign the school to the appropriate group which would result after the expected change in numbers has taken place.
- 8.2. Where the relevant body is the Governing Body of a school which has a delegated budget, no assignment may be made until the authority has been consulted.

## **Pay Progression**

It is the responsibility of the Governing Body to ensure that performance-based progression awards reflect individual performance.

Pay progression for members of the leadership group is already linked to performance and governing bodies have scope to differentiate or increase the progression reward available.

Schools should review and update their pay policies on an annual basis to ensure that they remain fit for purpose. They will need to revise their pay policies to reflect the changes to setting leadership pay and to clarify their approach to making decisions about pay progression for the leadership group. Governing bodies will need to satisfy themselves that objective-setting is rigorous and that the School's pay policy provides a clear link between levels of achievement and progression.

You will have the freedom to award progression increases as you judge appropriate in your particular circumstances. Although no progression award should be made if it is not justified, you may find it helpful to indicate the pay level that might be achieved after a certain period, subject to sustained, high-quality performance, through the establishment of pay points on those ranges which will be used by the School.

## **9. Determination of Leadership Pay Ranges**

- 9.1. The relevant body must determine pay ranges for the Headteacher and for Deputy Headteachers and Assistant Headteachers in accordance with paragraphs 9.2 to 9.4.
- 9.2. When determining an appropriate pay range, the relevant body must take into account all of the permanent responsibilities of the role, any challenges that are specific to the role, and all other relevant considerations. In the case of a new appointment, the relevant body may wish to consider whether the requirements of the post and the extent to which the preferred candidate meets those requirements are such that it would be appropriate to set the starting salary above the minimum of the relevant headteacher group. The relevant body must ensure that there is appropriate scope within the range to allow for performance-related progress over time.
- 9.3. Pay ranges for headteachers should not normally exceed the maximum of the Headteacher group. However, the Headteacher's pay range may exceed the



maximum where the relevant body determines that circumstances specific to the role or candidate warrant a higher than normal payment. The relevant body must ensure that the maximum of the Headteacher's pay range and any additional payments made under paragraph 10 does not exceed the maximum of the Headteacher group by more than 25% other than in exceptional circumstances; in such circumstances, the Governing Body must seek external independent advice before providing such agreement and support its decision with a business case.

- 9.4. The maximum of the Deputy or Assistant Headteacher's pay range must not exceed the maximum of the Headteacher group for the School, calculated in accordance with paragraphs 6 to 8. The pay range for a deputy or assistant headteacher should only overlap the headteacher's pay range in exceptional circumstances.

## **10. Determination of Temporary Payments to Headteachers**

- 10.1. Subject to paragraphs 10.2 to 10.4, the relevant body may determine that payments be made to a headteacher for clearly temporary responsibilities or duties that are in addition to the post for which their salary has been determined. In each case, the relevant body must not have previously taken such reason or circumstance into account when determining the Headteacher's pay range.
- 10.2. Subject to paragraph 10.3, the total sum of the temporary payments made to a headteacher in accordance with paragraph 10.1 in any school year must not exceed 25% of the annual salary which is otherwise payable to the Headteacher, and the total sum of salary and other payments made to a headteacher must not exceed 25% above the maximum of the Headteacher group, except as set out in paragraph 10.4.
- 10.3. Paragraph 10.2 does not apply to payments made in accordance with:
- a. paragraph 25 where those residential duties are a requirement of the post or
  - b. paragraph 27 to the extent that the payment is in respect of housing or relocation expenses which relate solely to the personal circumstances of that headteacher.
- 10.4. The relevant body may determine that additional payments be made to a headteacher which exceed the limit set out in paragraph 10.2 in wholly exceptional circumstances and with the agreement of the Governing Body. The Governing Body must seek external independent advice before producing a business case, seeking such agreement.

## **11. Pay Progression for Leadership Group Members**

- 11.1. The relevant body must consider annually whether or not to increase the salary of members of the leadership group who have completed a year of employment since the previous pay determination and, if it determines to do so, to what salary within the relevant pay range determined in accordance with paragraphs 4.4 and, where applicable, 5.3 and 9.1.
- 11.2. The relevant body must decide how pay progression will be determined, subject to the following:
- a. the decision whether or not to award pay progression must be related to the individual's performance, as assessed through the school or authority's appraisal arrangements in accordance with the 2012 Regulations

- b. a recommendation on pay must be made in writing as part of the individual's appraisal report, and in making its decision the relevant body must have regard to this recommendation
- c. where the individual is not subject to the 2012 Regulations, in order to reach a decision whether or not to award pay progression the relevant body must seek to agree objectives with the individual relating to school leadership and management and pupil progress and, in the absence of such agreement, must set such objectives, and must appraise the performance of the individual taking account of those objectives
- d. pay decisions must be clearly attributable to the performance of the individual
- e. sustained high quality of performance having regard to the results of the most recent appraisal carried out in accordance with the 2012 Regulations or the objectives agreed or set under paragraph 11.2(c) (as the case may be) should give the individual an expectation of progression up the pay range
- f. where in accordance with the provisions of an earlier Document the relevant body has determined a pay range the maximum of which exceeds the highest salary payable under this Document it must continue to pay any salary determined by reference to that pay range until such time as it reassesses the pay range for its leadership posts under the provisions of this Document.

The extract below is taken from the Secretary of State's statutory guidance, in Section 3 of the STPCD 2017.

### **Leadership Group Pay (paragraphs 4-11)**

The relevant body must ensure that the process of determining the remuneration of the Headteacher is fair and transparent. There should be a proper record made of the reasoning behind the determination of the Headteacher pay range (including any temporary payments made). Relevant bodies can find further guidance on the process for setting leaders' remuneration in Departmental advice "Implementing your school's approach to pay" via the GOV.UK website.

### **Headteacher's Pay Range**

The relevant body must assign a school to a headteacher group and determine the Headteacher's pay range whenever it proposes to appoint a new headteacher. It should also re-determine the Headteacher's pay range if it becomes necessary to change the Headteacher group (including where the Headteacher becomes responsible and accountable for more than one school in a federation on a permanent basis). It may also determine the Headteacher's pay range at any time if it considers it necessary to reflect a significant change in the responsibilities of the post. The relevant body should not take account of the salary of the serving Headteacher if it re-determines the Headteacher's pay range for a new appointment.

### **Headteachers Responsible and Accountable for more than one School on a Permanent Basis**

When a headteacher is appointed to be permanently responsible and accountable for more than one school, the relevant body should base the determination of the Headteacher group on the total number of pupil units across all schools, which will give a group size for the federation in accordance with paragraphs 6 or 7.

Consideration also needs to be given to the remuneration of other teachers who, as a result of the Headteacher's role, are taking on additional responsibilities. This will be based on any additional responsibilities attached to the post (not the teacher), which should be recorded. An increase in remuneration should only be agreed where the post accrues extra responsibilities as a result of the Headteacher's enlarged role. It is not automatic.

## **Limits on Payments**

The relevant body should have oversight of a headteacher's entire role, and any paid responsibilities attached to the role. This should ensure that the relevant body can take a fully informed decision about the appropriate remuneration for the Headteacher and any consequential implications for the pay of other staff who may be taking on additional responsibilities in the absence of the Headteacher.

It should be wholly exceptional for the total value of the salary - including temporary payments - to exceed the limit of 25% of the amount that corresponds to the maximum of the Headteacher group for the school or schools in any given year. If it is considered that there are wholly exceptional circumstances that warrant payments that exceed this limit, the relevant committee must make a business case for the payment to the full Governing Body. The Governing Body must seek external independent advice from an appropriate person or body, who can consider the provisions of the document and whether they have been properly applied to the Headteacher's pay and subsequently advise the Governing Body before the Governing Body decides whether it is justifiable to exceed the limit in each particular case. There must be a clear audit trail for any advice given to the Governing Body and a full and accurate record of all decisions made by the Governing Body and the reasoning behind them.

Where a headteacher receives a payment under paragraph 25 in respect of residential duties which are a requirement of the post, that amount does not count towards the 25% limit. Where a headteacher is awarded a non-monetary benefit under paragraph 27 and it is not a housing or relocation benefit that relates solely to the personal circumstances of that headteacher, the monetary value of the benefit counts towards the 25% limit.

## **Headteachers Temporarily Accountable for more than one School**

Occasionally, where there is a vacancy in the post of headteacher and it is not possible to appoint a deputy headteacher or another member of the teaching staff to take on the position of acting headteacher, a headteacher of another school may be appointed to be responsible and accountable for that school in addition to their continuing role as the headteacher of their own school.

This role should be regarded as an acting headship on a temporary basis for as long as arrangements are being made for a permanent headteacher to be recruited or to make alternative permanent arrangements, such as amalgamating the schools or creating a hard federation. There is an expectation that these temporary arrangements should be time-limited and subject to regular review and the maximum duration should be no longer than two years.

Any workload issues for the Headteacher and additional responsibilities for other employees as a consequence of this temporary arrangement should be addressed as part of the overall considerations by the relevant body in agreeing to the Headteacher undertaking the temporary additional role.

In order to support a headteacher who temporarily takes on the responsibility and accountability for more than one school the Governing Bodies of the schools concerned should establish clarity

regarding both how these arrangements will work in practice and how the arrangements will be brought to an end.

In such temporary arrangements, a fixed-term variation of contract must be issued by the contracting employer. This will specify that the Headteacher, in addition to their substantive post, is for a fixed period employed additionally as headteacher of the additional school/s. At the end of the fixed-term variation, the Headteacher will revert to their substantive post.

Under the Collaboration Regulations, the Governing Bodies may arrange for a joint committee made up of governors from all the Schools involved to be established to oversee the fixed-term arrangements. This joint committee should have delegated power to deal with the pay and performance management of the Headteacher and other relevant employee issues. This joint committee should also have delegated power regarding the financial arrangements which will apply during the collaboration period. For example, the joint committee should determine any payment on the basis of temporary additional responsibility for teachers, other than the Headteacher, in each school, and the arrangements for reviewing and ending those payments.

The joint committee should also take account of the circumstances of each school and the workload implications, including the extent to which the Headteacher is likely to be absent from the individual schools. Any temporary payments made under paragraph 10 should take account of the full responsibilities of the post. Where there is a deputy headteacher in the school, it may be more appropriate to increase their pay range temporarily to take account of the increased responsibilities in the absence of the Headteacher. Additionally, a teacher may be temporarily appointed, in the absence of the substantive post holder, to a post in the staffing structure which attracts a TLR payment; and in the case of a classroom teacher where none of those are appropriate, the joint committee may consider the use of additional payments under paragraph 26.1(d). The joint committee should ensure that any payment for additional responsibilities is in line with the provisions of the document and the School's Pay Policy.

Where the arrangement for the Headteacher is temporary, any adjustment to their pay and that of other teachers is also temporary, and safeguarding provisions will not apply when the arrangements cease.

## **Extended Services**

Local authorities are responsible for drawing up their local area plans. As part of those plans, they may choose to approach a school to ask whether the Headteacher and Governing Body would be willing to take responsibility for the provision of a range of extended services on their site for children and young people from the area. If the Headteacher and Governing Body agree to take on significant additional responsibility for which the Headteacher is directly accountable to the LA or the Children's Trust and the Headteacher is permanently appointed as headteacher of that school, the relevant body has the discretion to take this into account when setting the Headteacher's pay range. Any salary uplift should be proportionate to the level of responsibility and accountability being undertaken. In all cases, consideration needs to be given to the remuneration of other teachers who as a result of the Headteacher's role are taking on additional responsibilities. This will be based on any additional responsibilities attached to the post (not the teacher), which should be recorded. An increase in remuneration should only be agreed where the post accrues extra responsibilities as a result of the Headteacher's enlarged role. It is not automatic.

However, where a headteacher has an interest in the quality of a service that is co-located on the School's site, for example, a speech therapy centre that helps the development of young people within the School or across a number of schools, but is not responsible or accountable for that

service, this is part of a headteacher's core responsibilities, and would therefore not be taken into account when setting the headteacher's pay range.



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