

Human Resources

Transactional			
		Our responsibilities	Your responsibilities
Hiring			
1.	Appointments	<p>Process new appointments on the system, upon notification from the school.</p> <p>Produce letter of appointment and written statement of particulars for the school/employee to access by the first day of their appointment.</p> <p>Provide a copy of the letter and written statement to the school via email.</p> <p>Requests for manual payments due to failure to meet specified payroll deadlines will carry an additional charge and will be made at the discretion of the Payroll function.</p>	<p>Complete the appropriate entry for new employees accurately on the HR transactional site in accordance with specified payroll deadlines.</p> <p>Ensure that full and complete data is provided to include, email address, bank details etc.</p> <p>To meet the legal requirement to issue a written statement by the first day of employment, schools must ensure that all appointment paperwork for new appointments is sent to HR Service for Schools one month before the appointment start date and two months before the appointment start date for September appointments.</p> <p>Employee to pick up the contract/letter of employment through self-service or via the employer.</p>
Pay and Conditions			
2.	Salaries	<p>Ensure employees are paid the correct salary based on the information input into the system, subject to the timely submission of the information.</p>	<p>Input all information accurately into the HR transactional site in accordance with the specified payroll deadlines, terms and conditions of employment and relevant policies.</p>
3.	Payroll	<p>Work in collaboration with BCC payroll to ensure all transactions are processed accordingly (when purchasing both services).</p>	
4.	Allowances – support staff	<p>Pay employees the correct allowances in accordance with received instructions/information and the school/academy pay policy and terms and conditions of employment.</p>	
5.	Allowances– teachers	<p>Pay teachers the correct allowances in accordance with the</p>	

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	school/academy pay policy and terms and conditions of employment.	
6.	Overtime, casual and additional hours for support staff and teachers Workflow all approved hours submissions in relation to additional payments.	
7.	Extension of fixed term contracts Process all requests for extensions of fixed term contracts.	
8.	Underpayments Adjust any underpayment on behalf of the school.	
9.	Overpayments Attempt to recover overpayments on behalf of the school which may incur additional cost.	Input all information accurately on to the HR transactional site in accordance with specified payroll deadlines Due to the risk of potential claims (for example, grievance and discrimination) from employees, schools are strongly advised to adhere to our model overpayments policy available on the HR transactional site
10.	Contractual changes Based on information provided, process and transact accurately all authorised changes to contracts and pay in relation to: <ul style="list-style-type: none"> • change in hours • extension and expiry of fixed term contracts • grade changes • adjustment to salary including pay progression • additional contracts 	Input all information accurately on to the HR transactional site in accordance with the specified payroll deadlines, terms and conditions of employment and relevant policies. In addition, the school must ensure governing body approval is sought where changes to head teacher's pay is requested. Signed and dated governing body minutes are to be retained.
11.	Casual workers Process the casual worker based on the information input into the system Issue a copy of the letter and the casual worker agreement to the school via email or the employee through ESS Undertake any pre-employment checks including: <ul style="list-style-type: none"> • DBS and right to work checks 	Input all information accurately on to the HR transactional site in accordance with specified payroll deadlines terms and conditions of employment and relevant policies. In order to issue a written statement by the first day of employment, schools must ensure that all appointment paperwork for the casual worker is sent to HR Services for Schools one month before the appointment start date and

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		<p>DBS checks are offered as a supplementary service.</p>	<p>two months before the appointment start date for September appointments.</p> <p>Employee to pick up the contract/letter of employment through self-service or via the employer</p> <p>Obtain satisfactory references and complete all pre-employment checks required for the single central record and part 3 of Keeping children safe in education,</p> <p>Ensure that casuals working on a regular basis are reviewed termly and their contractual status updated as necessary.</p>
12.	Employee Self-service (ESS)	<p>Provide access to ESS for all employees where an e-mail address has been provided</p> <p>Provide training guides and support to facilitate the use of ESS</p>	<p>Provide us with an e-mail address for ALL employees</p> <p>Advise employees of the requirement to create an ESS account</p> <p>Ensure employees take responsibility for updating personal details, to include but not exclusive to, bank details, next of kin details and personal data</p> <p>Ensure ALL employees are aware that they need to use ESS to access their employment related documents e.g., contracts, contract changes and letters related to their employment, electronic payslips, and year end documentation</p>
13.	My appraisal and performance management support staff	<p>Ensure that eligible employees are paid increments in accordance with the school/academy's performance management scheme.</p>	<p>Ensure all necessary information in relation to outcomes is provided to HR in accordance with specified payroll deadlines.</p>
14.	Calculation and payment of all occupational and statutory sick pay	<p>Calculation and payment of occupational and statutory sick pay entitlements to all staff, HR will undertake salary adjustments where necessary.</p> <p>HR will alert schools/academies where incorrect entries have been made onto the HR transactional site, and when staff are due to exhaust their sick pay entitlements.</p>	<p>Ensure all absence is input accurately onto the HR transactional site, in accordance with specified monthly payroll deadlines.</p> <p>Where available access the appropriate entitlement calculators to obtain relevant salary information to view changes and reductions in entitlement.</p>

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			Issue the appropriate letters to notify staff of when they are due to exhaust their sick pay entitlements.
15.	Salary payment requests	<p>Requests for manual payments or the processing of late request for payment of salary will be made at the discretion of the Payroll function and will only be provided where an employee faces financial hardship. They will not be provided for non-payment of additional hours, overtime or for allowances where the employee is in receipt of their basic salary.</p> <p>Where payment is missed because of an error made by the school/academy, late payment will only be arranged in exceptional circumstances and HR will charge a fee for each late payment request.</p>	To request such payment in discussion with the employee and your HR officer.
16.	Requests for details of earnings	Provide details of employee's earnings to third parties provided written authority is received from the employee to release such information, via the school.	Ensure any requests for employment and earnings information is sent to HR, along with written consent form the employee as soon as possible, and within 5 days of receipt of any such request from a third party.
17.	Technical helpdesk	To assist with technical issues and queries relating to use of Oracle and our website.	Ensure that appropriate IT infrastructure is available to allow for From Raiser, Form Authoriser and Employee Self Service access.
Absence			
18.	Absence recording	<p>Calculation and payment of all authorised and unauthorised leave of absence. HR will undertake salary adjustments where necessary.</p> <p>HR will alert schools where incorrect entries have been made onto the HR transactional site.</p>	<p>Ensure that all absence, including authorised and unauthorised absence, is input accurately onto the HR transactional site in accordance with specified monthly payroll deadlines.</p> <p>Where available access the appropriate entitlement calculators to obtain relevant salary information.</p>

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19.	Maternity, Paternity adoption and Shared Parental Leave	<p>Calculation and payment of maternity, paternity, adoption or shared parental leave and pay in line with national and local conditions of service.</p> <p>HR will issue a letter to the employee notifying them of their occupational and statutory entitlements.</p>	<p>Ensure that maternity, paternity, adoption and shared parental leave notifications are input accurately onto the HR transactional site.</p> <p>Where available access the appropriate entitlement calculators to obtain relevant salary information.</p>
20.	Industrial injury – support staff only	<p>Process claims for industrial injury on behalf of the school.</p>	<p>Provide all relevant information needed to process the claim.</p> <p>Meet the costs of:</p> <ul style="list-style-type: none"> any medical examinations required charges for access to medical information any subsequent claim
21.	Teachers accident scheme	<p>Process any claims for accident pay on behalf of the school.</p>	<p>Provide all relevant information needed to process the claim.</p> <p>Meet the costs of:</p> <ul style="list-style-type: none"> any medical examinations required charges for access to medical information any subsequent claim
22.	Road traffic collisions	<p>Ensure third party liability letters are issued to employees involved in a road traffic collision.</p>	<p>Input the correct absence detail through the HR transactional site as required by specified payroll deadlines, indicating that the absence is as a result of a RTC.</p>
23.	Strike action	<p>Publish communications on the HR transactional site in relation to known industrial action and process relevant salary deductions based on instructions provided.</p>	<p>Ensure the relevant entry is made on the HR transactional site indicating absence due to industrial action.</p>
Recording and reporting			
24.	School workforce census (SWF)	<p>Submit the school workforce census, based on information provided and entered on to the transactional site on behalf of your school via the DFE submission service.</p>	<p>Secondary schools will need to upload their curriculum data onto collect, by the given deadline.</p> <p>Information and data required for the submission to be provided by the given deadline.</p>

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		Liaise with DFE regarding submission.	
25.	Gender pay gap	Where the school headcount is 250 or more employees on the relevant date of each year, we will provide data for your gender pay gap report and provide guidance and support in the preparation of this data for publication.	Publication of the data and any narrative to be issued alongside it.
26.	Personal records	The service does not retain personal files on behalf of the school/academy	<p>The school must retain the following employee records in accordance with Data Protection legislation and GDPR:</p> <ul style="list-style-type: none"> • MAT B1 forms • performance management record • references • Any pre-employment checks including right to work documents • medical information • return to work interviews • fit notes • disciplinary records • capability records • grievance records • leave requests • banked hours forms • address changes • personal info changes • recruitment paperwork including application forms <p>The employee must provide timely updates in relation to any changes to their personal details via Self-service or through the employer as appropriate</p>
Leavers			
27.	Leavers (resignations)	Process resignations and provide letters confirming termination of employment within 14 days of being notified that an employee is leaving.	Input all information accurately on to the HR transactional site in accordance with the specified payroll deadlines.
28.	Leavers (retirements, early retirements, phased retirements)	<p>Send out letters confirming retirement.</p> <p>For applications for flexible retirement relating to support staff –</p>	<p>Input all information accurately on to the HR transactional site in accordance with the specified payroll deadlines.</p> <p>Follow the procedure defined on the HR transactional site for applications for</p>

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		HR will notify the school when the application is agreed or declined.	voluntary early retirement, flexible retirement and retirement arising from redundancy.
29.	Ill health retirement	Work in collaboration with ER (or the school's legal advisers) to process any ill health retirements.	Take advice from ER (or the school's legal advisers), where the school wishes to process ill health retirement for an employee.
30.	Retirement gifts (non-cheque book and external payments account (EPA) schools only)	<p>For those employees eligible for a retirement gift, HR will write to the employee with details of the maximum value of the gift and how to reclaim the cost of the retirement gifts.</p> <p>Upon receipt of a valid receipt or receipts, HR will arrange to reimburse the employee.</p>	<p>Notify HR when an employee retires by inputting all information accurately on to the HR transactional site in accordance with specified payroll deadlines.</p> <p>Cheque book and academy schools will be required to reimburse retirement gifts directly. HR cannot arrange these payments.</p>
31.	Dismissals	Process dismissals and provide letters confirming termination of employment within 14 days of being notified an employee is leaving and liaise with ER (or the school's legal advisers) to issue the letter in the case of dismissal for disciplinary reasons.	<p>Input all necessary information accurately into the HR transactional site in accordance with the specified payroll deadlines.</p> <p>Community schools, community special schools, voluntary controlled schools, maintained nursery schools, pupil referral unit - if your school does not purchase the employee relations service from the authority you must still notify the employee relations team in advance of the possibility of dismissal so that the authority may exercise its statutory right to attend all hearings.</p>
32.	Settlement agreements	Process any payments agreed between schools and ER (or the school's legal advisers) in relation to settlement agreements, once the document has been checked and approved by BCC legal team.	<p>Seek advice from ER (or the school's legal advisers), before agreeing any settlement agreement.</p> <p>Community schools, community special schools, voluntary controlled schools, maintained nursery schools and pupil referral units who do not purchase their ER services from HR Services for Schools will need all settlement agreements scrutinised by the LA before agreement of the document and payment.</p> <p>Allow sufficient time to obtain legal advice and reflect this in the date of agreement. Provide a minimum of 14 days turnaround for BCC Legal advice.</p>

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33.	Redundancy	<p>Work in collaboration with ER (or the school's legal advisers) to calculate redundancy payments and process these for payment.</p> <p>In accordance with s.37 of the Education Act 2002 the cost of redundancy payments in maintained schools will be charged to 'schools budget' if the authority has good reason to do so.</p> <p>Once a redundancy position is confirmed, redundancy figures will be checked prior to issue.</p>	<p>Seek advice from ER (or the school's legal advisers), where restructures may result in redundancy.</p> <p>Notify the authority of proposals for redundancy so that the authority may exercise its right to be present at all relevant proceedings.</p> <p>Where available access the appropriate entitlement calculators to obtain relevant information and individual calculations.</p>
Miscellaneous			
34.	Data security	To provide data security for your online transactions using our transactional site.	It is recommended that you use Microsoft Edge as your web browser for Oracle.
35.	Pensions	<p>Liaison with BCC payroll to ensure adjustments are made based on instructions provided, to pension records regarding:</p> <ul style="list-style-type: none"> • pay awards • salary increments • performance management • salary variations • strike action • sickness • maternity • adoption • part time elections • change of hours • elected further employment • monthly data collection 	No further action is required by the school on the understanding that all initial transactions have been undertaken accurately by the form raiser and form authoriser in accordance with specified monthly payroll deadlines.

Human Resources

Advice and Guidance		
	Our responsibilities	Your responsibilities
1.	Appointments	Undertake salary assessments and calculations, based on information provided.
2.	Pay and Conditions	<p>To provide advice and guidance in relation to</p> <ul style="list-style-type: none"> • Salaries • Allowances • Overtime and additional hours • Extension of fixed term contracts • Underpayments • Overpayments • Contractual changes
3.	Performance management (PM)	<p>To provide advice and guidance relating to head teachers, principals, teachers or support staff not meeting the necessary professional standards.</p> <p>Provide advice and guidance in line with the PM scheme and pay progression framework for support staff and the appraisal regulations for teachers adopted by the school.</p>
4.	School Teachers pay and conditions document	<p>Provide associated advice and guidance to ensure compliance.</p> <p>Consult with Trade unions and provide a model Pay Policy template.</p>
5.	Support Staff, LGA, Green Book terms and conditions	Provide associated advice and guidance to ensure compliance.
6.	Leavers	<p>To provide advice and guidance in relation to</p> <ul style="list-style-type: none"> • Resignations • Retirement • Retirement gifts <p>Provide redundancy calculations where requested and appropriate information is provided</p>

7.	Absence	<p>To provide advice and guidance in relation to</p> <ul style="list-style-type: none"> • Maternity leave • Paternity leave • Adoption leave • Shared Parental Leave • Statutory and occupational Sickness absence • Support Staff Industrial Injury • Teachers' accident scheme • Strike action <p>Provide relevant communication relating to strike action</p>	Provide full and accurate information pertaining to the query
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Employee relations

Our responsibilities		Your responsibilities
ADVICE AND GUIDANCE		
1.	HR policies and procedures	Provide solution-focussed advice on the interpretation of relevant policies and procedures, employment legislation and best practice.
		To ensure the governing board has adopted all recommended BCC policies and procedures. To adhere to the ER officer advice in line with the policies and procedures adopted by the governors.
2.	Updating HR policy and procedures	To consult on model policies and procedures with the trade unions to ensure they are available to BCC Community schools, Voluntary Controlled and LA Maintained Nurseries as a statutory responsibility.
		To adopt and adhere to the relevant policies and procedures and ensure that they are available to managers and all employees as necessary. A copy of key HR policies should be left in the staff room or made available electronically, so all employees have access to them.
		All Foundation, Voluntary Aided, Academies and Free schools will have access to policies and procedures if they purchase Schools ER service.
		To ensure that the relevant policies and procedures are streamlined, comply with employment law, education regulations and the effective and early resolution of staffing matters.
		To assist with consulting on changes to policies at individual school and level where required.
		Foundation, Voluntary Aided, Academies and Free schools will incur a cost for any policy changes and subsequent consultation with Trade Unions.
Conflict management		
3.	Disciplinary, grievance and dignity at work conflict management	Provide advice and guidance to head teachers and principals, their senior leadership team (SLT), and governors in relation to dispute resolution, investigations and hearings where requested, progressing this to legal/counsel
		To seek advice and guidance from your ER officer or the initial response team on incidents or issues that may result in disciplinary action, grievance, bullying and harassment or grievance being raised against the manager or employee.

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		opinion for litigation work as necessary.	
4.	ER consultancy advice and guidance on all matters relating to dispute resolution	<p>Provide clear advice to schools on where further advice and guidance can be sought, such as the HR transactional site, and links to:</p> <ul style="list-style-type: none"> • articles • legislation • policies • procedures • best practice <p>Where schools purchase the ER service, they will also receive:</p> <ul style="list-style-type: none"> • template letters • guidance documents 	Where a full investigation is required it will be undertaken promptly seeking advice from ER as necessary on policies, procedures, employment law, education regulations, national and local conditions of service.
5.	Mediation, return to work strategies and exit negotiations	Provide ER consultancy advice and guidance on all casework including referrals for mediation, negotiating exit arrangements, facilitating employee support programmes and prompt return to work strategies.	Seek advice from ER prior to suspension, investigations, special leave and negotiating settlements. Provide time off for staff to participate in mediation.
6.	Attendance at meetings and hearings	<p>Where required and in accordance with the procedures, attend meetings between the employee, their representative and head teacher or principal at the school, other venue or via a virtual platform.</p> <p>A separate hourly rate may apply depending on the level of service purchased.</p>	<p>Ensure disciplinary, grievance investigations, meetings and hearings are carried out within specified policy and procedural deadlines</p> <p>Ensure the appropriate governor committees are set up including appeals. Arrange for a clerk to minute any formal hearing. Ensure all appropriate HR policies and procedures have been ratified and adopted by governors.</p>
7.	Liase with BCC legal services in relation to judicial mediation, litigation matters including employment tribunal defence and risk management	<p>Support BCC legal services in providing advice, support and assistance with responding to court and employment tribunal cases with a view to successful resolution or settlement including:</p> <ul style="list-style-type: none"> • provision of a suitable defence • attendance as a witness • preparing legal bundles • negotiating settlements • attending judicial mediations • providing advice to the school 	<p>Provide HR and BCC legal services with all relevant paperwork and evidence and ensure that it is maintained for audit purposes.</p> <p>Provide access to all relevant witnesses in support of such court and tribunal cases.</p> <p>To obtain separate legal advice and/or counsel opinion as required for representation at employment tribunals and court proceedings.</p> <p>Where you have sought advice from an alternative ER/HR/Legal provider whilst purchasing the schools ER Service or where BCC is the overall employer, please note BCC have the authority to withdraw their legal services which may</p>

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			include indemnity against any potential claims. Therefore, it is strongly advised you are assured in writing by your alternative ER/HR/Legal provider that they will indemnify you against any potential claims and/or associated costs.
Absence management			
8.	Attendance management and leave of absence meetings	<p>Provide advice, support and guidance on relevant policies and procedures in the pro-active management of attendance matters including identifying absence trends, reviewing staff attendance data, managing long and short-term sickness issues and agreeing a plan of management action.</p> <p>To interpret the leave of absence scheme adopted by the school. (This is a condition of service in BCC schools.)</p>	<p>To advise ER of any issues with teaching and support staff attendance.</p> <p>To utilise the employee absence data via the HR transactional site. To discuss and review staff absence with the appropriate governors committee.</p> <p>Ensure staff understand the basis of leave of absence entitlements and where there is discretion to grant such leave.</p>
9.	Occupational health referrals, appointments and medical reports	<p>Provide a choice of preferred occupational health providers. Ensure all staff attendance matters and referrals are managed in line with the relevant policies and procedures, and with full consideration of the impact on the school, other staff and the employee.</p> <p>Support with occupational health referrals and interpretation of medical reports including advice on the implementation of any medical advice.</p>	<p>Ensure a Managing Attendance Policy is ratified and adopted by governors and raise awareness of this with staff.</p> <p>Ensure that all staff are aware of the relevant policies and expectations including a clear system for reporting staff absence.</p> <p>Ensure all staff absence is recorded on the HR transactional site.</p> <p>Keep in regular contact with the employee and liaise with occupational health for management discussions around specific cases.</p> <p>To consider and implement where applicable, all medical advice received following an occupational health referral.</p>
Restructure and redundancy			
10.	Restructure and redundancy	To provide advice and support on the process of restructuring, discussing alternative staffing	Seek advice and guidance from the ER officer on issues likely to result in a reduction in staffing levels or changes to staff terms and conditions, or

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		<p>solutions, outplacement support and consultation obligations.</p> <p>Defining a clear process in line with appropriate policy and procedures and to ensure positive outcomes for pupils.</p>	<p>dismissals so that the authority can exercise its statutory right to give advice.</p>
11.	Attendance at restructuring and redundancy meetings or hearings	<p>To attend relevant consultative meetings and hearings with the school, trade unions and staff if required and ensure that the appropriate template paperwork is available.</p> <p>An additional charge will be levied on schools depending on the level of service purchased.</p>	<p>To inform the ER officer of the dates of relevant meetings and hearings so technical advice can be arranged and ensure the ER officer is in receipt of all hearing paperwork in advance of the hearing taking place.</p>
12.	Redundancy, pension illustrations and facilitating career transition support for staff facing redundancy	<p>Advise the school to obtain the necessary redundancy pension figures. Refer the school to appropriate career transition support providers.</p> <p>Teachers must now obtain their own pension estimates.</p>	<p>To provide the HR officer with relevant employee information to ensure redundancy payments are accurate and access to pension provisions is timely.</p>
13.	Termination of employee contracts	<p>Ensure the HR officer is advised of any termination of contract arising from negotiations or the outcome of litigation and employee exit arrangements.</p>	<p>To ensure the HR transactional site is updated accordingly. To undertake any exit staff arrangements in line with professional advice issued to the school.</p>
14.	Payment of redundancy and pension entitlements	<p>Ensure the HR officer is advised of any termination of contract arising from such procedures.</p>	<p>To ensure that the relevant paperwork is available to process statutory and other entitlements.</p>
MISCELLANEOUS			
15.	Changes to school's status including academy, trust, foundation and other conversions	<p>Community and voluntary controlled schools only - Take a lead role for the LA for TUPE arrangements including conducting the TUPE consultation with all staff involved whilst working alongside the head teacher, principal, SLT and governors throughout the process.</p> <p>All other schools – provide professional support and advice as required.</p>	<p>Validate the staffing and employee liability information to ensure it is accurate at the point of transfer. This must be attached to the commercial transfer agreement and ensure invitations to the unions and staff associations to attend a facilitated TUPE consultation meeting.</p>

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		<p>Liaising with sponsors as appropriate and assisting with the various forms required by TUPE.</p> <p>Drafting of various items of TUPE information and provision of a current school staffing establishment list to ensure that the transfer is achieved as per the target date.</p> <p>In future there may be an additional LA charge for some academy conversions including HR support. This will be implemented following discussion with individual head teachers, governors and sponsors.</p>	
16.	Risk management	Identify any areas of risk that may lead to adverse claims against the head teacher, principal or governors and the LA, following a restructure or redundancy process.	Explore and identify alternative staffing solutions and redeployment opportunities to militate against a redundancy situation.

Miscellaneous

1.	Complaints	HR Services for Schools will acknowledge and investigate any complaint within 5 working days of receipt.	Schools to submit any complaint via email to schoolshrcommunications@Birmingham.gov.uk
2.	Termination of the Schools HR service	<p>Terminate all employee records and access to the HR transactional site on the day the service provision is to cease.</p> <p>Where the required notice period is not given a charge will be raised.</p> <p>Charges will be incurred for the 6 month notice period stipulated or the remainder of the contract.</p>	Give Schools HR the required 6 months' notice period to terminate the HR service.
3.	Data protection and the General Data Protection Regulation (GDPR)	Ensure that any paperwork relating to employees is retained in line with the Data Protection Act (DPA) and General Data Protection Regulations (GDPR).	Ensure all employee data including notes and paperwork associated with investigations, hearings and appeals are maintained at school level in line with the DPA and available for a court or employment tribunal.

Appendix A

Charges for pay as you go services 1 April 25 to 31 August 26

Service	Detail	2025/26
DBS Clearances For BCC Maintained Schools who purchase Gold or Silver	Enhanced Standard Volunteer	
Advertisement Service For BCC Maintained Schools who purchase Gold or Silver	One publication & upload to BCC website For Gold or Silver customers As a stand alone Service Upload of support documents to BCC website e.g. application form, job description etc Upload to wmjobs.co.uk Promotion on social media – X (Twitter) and LinkedIn Requests for inclusion in other media will be invoiced at additional cost to the academy	
Salary Statements For BCC Maintained Schools who purchase Gold or Silver	Production of Salary Statements following the completion of annual pay progression: Teaching Staff Support Staff	
Independent Investigations		