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**SERVICE CHILDREN'S EDUCATION  
VOLUNTARY EARLY RELEASE SCHEME 2015  
STAFF BRIEFING NOTE**

The purpose of this note is to provide all staff within SCE with feedback from the recent VERS panels for exits in the summer of 2015. It should be cascaded to all SCE staff not just those who applied for VERS and will be made available on the SCE Website.

All staff who applied for VERS in 2015 have been sent a personal email and letter providing them with the outcome of their application.

**VERS PANEL FACTS**

- 174 people applied for VERS with two applicants withdrawing their application in writing prior to the panel sitting. The panel therefore considered 172 applications.
- Of the 172 applications that the panel had to consider 90 came from applicants in schools closing in 2015 or in HQ SCE posts where a service was being reduced.
- The panel was chaired by the Director of Children and Young People, Mike Cooper. Panel members included:
  - Kathryn Forsyth, Director of Education
  - Karen Allen, DCYP B1
  - Paul Niedzwiedzki, AD Ops & Plans
  - Johanna Murphy, AEO Recruitment
  - Mark Fraser, AD Pupil and Family Services
  - Paul Melton, DCYP Resources & Finance Manager
  - Andy Manders, C2 DCYP Corporate Services acted as Secretary to the Panel.
- There were three independent observers whose role was to oversee the process to ensure that correct processes were followed and that appropriate decisions were made with due regard to fairness and equality:
  - Jane Myers, the HR Business Partner in Germany
  - Martin Wort, Army Headquarters Central Manpower Team
  - John Turner, National Union of Teachers.
- The following decisions were made:
  - 115 applications were agreed
  - 52 applications were not agreed
  - 5 decisions were deferred.
- The applications that were deferred were all from personnel in SCE headquarters. It was not possible to reach a final decision on these cases as the future HQ SCE structures have not been formally agreed. The deferred cases will be considered in the autumn, in time for the final decisions to be issued within the same time scales as the formal offers being issued to those applications which were approved.

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## SCOPE OF THE PANEL

In establishment terms, in 2015 we have to reduce by approximately 190 UK based civilian posts. These posts are in schools that are closing or are amongst a small number of SCE Headquarters staff either attached to the closing schools or serving in areas where numbers mean we are reducing our services. Not all of these posts are currently filled - at the end of June 2014 just 155 posts in closing schools were occupied.

The panel's aim was to release as many people as was safe to do so. They hoped to enable those individuals in closing schools who wanted to take early release, to depart on voluntary exit terms if possible and where practical to release applicants from other schools in order to allow staff that wish to remain with SCE to have an opportunity to find alternative employment.

It is important to understand however, that once an individual is released on voluntary exit terms they cannot be replaced by the use of external recruitment. This meant that to allow somebody from outside of the 2015 closing schools to depart on voluntary exit terms, the panel had to be very confident that suitable internal candidates would be available to fill that post where a replacement was required.

Another factor that the panel took into account was the degree of turmoil that potential voluntary exits might have on schools that were remaining open. In considering the risk associated to that turmoil the panel also looked at the number of fixed term appointees within the school staff. Whilst we employ many excellent staff on fixed term appointments, the panel judged that the nature of these appointments introduced a risk of there being a de-stabilising effect if a school faced departures from both fixed term appointees and staff on voluntary exit terms at the same time. This meant that where we had a high number of VERS applications from one school or where a school had a high number of fixed term appointees on their staff, some or in a few cases, none of the applications were agreed.

## SELECTION CRITERIA

The panel did not have a target to work to but it did have a ceiling that equated to the number of posts being cut in 2015. No individual, even those in closing locations had an automatic entitlement to a VERS offer; therefore the task of the selection panel was to decide which individuals could be released without adversely affecting SCE and the children we teach.

The panel considered the value of an individual's skills. The line management skills score relating to each application was designed to inform and assist the panel but it did not dictate a decision as it was checked for consistency by comparing it with skills scores in other schools and an individual's skills type or specialist responsibilities.

All of this was weighed against that the likelihood of finding a suitable replacement from within SCE.

Where the status of an applicant's post and the value and availability of their skills carried equal weighting to another application then the panel had to consider the relative cost between each applicant although there were only a very small number of cases (less than 5) where cost needed to be taken into account.

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The panel took many skills factors into account but age, gender, race, sexual orientation or any disability played no part in the panel's decision making as observed and confirmed by the independent panel members.

#### WHAT HAPPENS NEXT?

For those individuals whose application was successful, they now have a binding commitment from the MOD to allow them to depart on voluntary exit terms in 2015 and Defence Business Services (DBS) will be asked to calculate a forecast of the compensation payment that they would receive.

We expect to DBS have produced those estimates by early November and then individuals whose applications have been accepted, will receive their formal offer with their compensation estimate. At that point individuals will have ten working days to reach a final decision on whether or not to accept the VERS offer. Once an individual accepts their offer they will no longer be entitled to apply for posts within the MOD. If they are priority movers they will at that point lose that priority mover status.

It is hoped that those individuals whose applications were unsuccessful will recognise that there has been a thorough screening and fair consideration of their application. There is no appeals process against the decision. However, if they have evidence to demonstrate that the selection process has not been followed correctly in their case, they may raise the matter through the MOD Departmental Grievance procedure.

Unsuccessful applicants have been reminded that having their application declined at this time does not mean that they cannot apply for a VERS exit in 2016 or 2018 and the outcome of this application will have no bearing at future panels.

#### FURTHER INFORMATION

Question and Answer material has been attached to this briefing note to expand on issues that we believe may be the most commonly asked questions but if there are any questions not addressed in this material, please submit it to the [DCYP-Estabs-Mailbox@mod.uk](mailto:DCYP-Estabs-Mailbox@mod.uk) and we shall try to respond to the question and where there is a common theme, add it to the Q&A material on the SCE Website.

## **QUESTION AND ANSWERS – SCE VERS 2015**

### **1. Why did the panel meet so soon - closures are over a year away?**

It was very important to reach decisions well in advance not least because individuals need a degree of certainty about their future. In addition, if Defence Business Services (DBS) are to complete their work on the formal estimates in the timescales we require, then we need to confirm the details of who we are proposing to release to them by the end of July 2014.

VERS is a voluntary exit scheme which is part of SCE's pre-redundancy mitigation strategy but if insufficient numbers accept their VERS offers and staff in closing locations remain without future employment, then it will be necessary to proceed to voluntary redundancy in early 2015. If that fails to reduce the number of surplus staff then the next stage will be compulsory redundancy. Each of these steps takes time therefore in order to proceed through each stage in time to manage all individual exits by 31 August 2015, the pre-redundancy voluntary exits must be agreed by December 2015.

### **2. Why were Head Teacher's not on the Panel?**

It would not have been practical to have each Head Teacher on the panel nor an appropriate use of their time to have them sit through discussions on staff from outside their school but Head Teachers were involved in the process as they provided the skills score for their staff and had the opportunity to expand on the rationale for that score in advance of the panel.

### **3. If there are 155 people still employed in closing schools, why didn't you say 'Yes' to 155 people?**

Because it was not necessary to do so. In addition to the those individuals from closing schools who applied for VERS, there are forty individuals who either have fixed term appointments ending by August 2015 or who have already secured new positions. This means that there are only around thirty individuals who have not applied for VERS and will therefore be looking for alternative employment within SCE.

Whilst we wanted to release people wherever we could in order to minimise the risk of redundancy, we could not take a risk where there was insufficient evidence that where a replacement was required, that we would be able to recruit through an internal appointment.

We therefore tried to strike a balance and allow as many people to depart as possible to create employment opportunities but where there was any risk that it would lead to external recruitment we had to say 'No'.

We believe that a total number of 115 agreed voluntary exits will achieve the balance we need as there will inevitably be further internal employment opportunities arising as a result of routine resignations.

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**4. Why did you defer some decisions – surely you must know whether or not people can be released?**

Whilst it is far from ideal, it was necessary to defer a small number of decisions. We are very close to understanding our future Headquarters structures but we have some work to complete before we can make those final decisions.

It would have been wrong to have said 'Yes' to individuals and to have subsequently created a problem by releasing an individual in 2015.

In the past we have taken strategic decisions on our structures but subsequently, risks associated with releasing individuals early, materialised. In the coming years the organisation will experience significant change and upheaval through its transition to a new future operating model; to increase the burden on staff who will remain throughout that period when it is not necessary to do so was uppermost in our minds. Equally we felt it unfair to simply say 'No' when within the next couple of months, we are likely to have a much clearer picture and may be in a position to allow some Headquarters staff to leave on voluntary exit terms.

**5. How did you make your decision that you could release someone from outside a closing school where a replacement would be required?**

We took risk-based judgements for this group of individuals. We compared the skills and responsibilities of applicants with the potential pool of skills and responsibilities of staff that would be eligible to apply as internal applicants within SCE either on level transfer or on promotion. If we believed we had a very good chance of finding a replacement we were able to say 'Yes' to the applicant. We were very careful not to expose ourselves to significant risk in our decisions – if we did not believe there was the potential for a number of internal applicants for a post vacated by a successful VERS applicant, then we had to say 'No' as we would not be allowed to recruit externally.

**6. If you identified a potential skills match with someone in a closing school, does that mean that the post will be automatically given to that individual?**

No – The matching of availability of skills does not constitute a judgement on whether a particular individual should be appointed to a particular post. Posts will be filled using the MOD's Managing Surpluses principles with staff appointed through open and fair internal competition through Civil Service Jobs. Initially priority movers from closing schools will have the opportunity to apply and be considered ahead of staff without priority mover status but if we move through that stage, a post can be filled internally through open and fair competition amongst other suitably qualified SCE staff.

**7. I have been judged to be good or outstanding under the former SCE Priority Posting Status (PPS) – does that mean I will have priority over other applicants to apply for posts created by releasing people from outside of closing schools?**

No – there has already been quite a lot said and written on this subject and it is recognised that individuals who found the process stressful but were successful, feel somewhat disappointed that it now no longer provides them with a 'priority ticket' for redeployment. That disappointment is well understood but our obligation is to comply with the MOD Managing Surplus Staff Agreement which is based on both employment law and good practice.

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All staff in closing school will receive written guidance and a face to face briefing early in the autumn term to explain their priority mover status but at the heart of that status is the principle that all surplus staff/priority movers must have equality of opportunity to apply for posts for which they are suitably qualified and be considered ahead of non-priority movers.

**8. If my application has been agreed, can the MOD change their mind and refuse to let me go if a number of staff unexpectedly resign?**

The decisions made by the panel are final and binding on behalf of the MOD once communicated to the individual. We have assessed the risk of this happening in our judgements on how many people to say 'Yes' to.

**9. I applied for VERS and have been accepted but I no longer wish to take VERS – can I withdraw my application to allow someone else to be released in my place?**

It is too late to withdraw your application but you do not have to accept the offer when you receive your formal compensation estimate in November.

It is not possible to make further VERS offers to individuals as part of this voluntary exit scheme so even if you asked to withdraw your application now, someone cannot be released in your place as part of the VERS 2015 exit scheme.

**10. If I have been successful, what will I receive in November?**

DBS will provide a formal estimate of your VERS compensation and if you are over 55 years of age on 31 August 2015, you will also be provided with a pension estimate. You will receive a letter with the formal estimate and there will be a form for you to complete which indicates whether or not you intend to accept the VERS offer.

You will have ten working days to reach your decision. There will be mechanisms in place to ensure that you can communicate your decision within the designated timescale – i.e. you will be able to email or fax a reply and follow this up with a hardcopy containing an original signature.

**11. If I accept VERS, will I still be able to apply for posts within the MOD?**

No – once you have accepted VERS you will no longer be able to apply for posts within SCE or the MOD but you will of course be free to start looking for a new post with a new employer and be in a position to confirm your availability to start in the autumn of 2015.

**12. What happens if my financial circumstances change after I have accepted VERS in November and I can no longer afford to leave on VERS?**

Whilst we understand that this would be a very difficult situation, unfortunately once you have accepted your VERS offer, it then becomes a mutually binding arrangement – it is important therefore that you fully consider your position and the risk of that changing before you take any decisions. Should you find yourself in a difficult situation you may formally apply to have the MOD consider whether or not they could permit you to withdraw your VERS acceptance but you should fully understand that with the drawdown in Germany and the closure of so many SCE schools, the likelihood of the MOD being able to agree to such a request is small.

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**13. If I am in a closing school or my HQ post is ending and have either not applied for VERS or turn down a VERS offer, what will happen to me?**

You will receive fuller written guidance on your priority mover status and what that means early in September and will be invited to attend a staff briefing sometime between mid-September and early October but by January 2015 we will have details of all staff who have accepted VERS and will therefore know who remains at risk of redundancy if they do not find alternative employment. At that point we will be able to advertise the posts that will be created through VERS departures outside of closing schools but we shall begin to run the Voluntary Redundancy process in parallel. Our aim is to have completed the necessary recruitment action early in 2015 to enable us and individuals to take informed judgements during the voluntary redundancy phase which is expected to be completed by Easter 2015. Ultimately it may be necessary to proceed to a Compulsory Redundancy phase which we would expect to begin early in the Summer Term to allow for managed exits by the end of the school year on 31 August 2015.

**14. How can I be sure that my application was not unsuccessful because of my gender or because I am older and have a lot of service and therefore I would be expensive to release?**

You should feel assured that there was no age or gender bias. The vast majority of decisions were made without the panel seeing the age of an individual or the cost of releasing that individual.

All applications were judged on the basis of the skills of the applicant and the risk of letting them go. There were only a very small number of cases (less than 5) where cost was taken into account and that was because all other factors were equal and we could not let everyone go.

Some of the least expensive staff to release had their application declined because of their high skills value to SCE and of the ten most expensive applications; five were agreed because it was in the MOD's interest to do so because of the post location or the skills value.

Approximately 28% of successful applicants were over 55 years of age and 20% were under 35 years of age.

More female applicants were successful in their application but that is not surprising as there were more than twice as many female applicants! Approximately 71% of female applicants were successful in their applications compared with 65% of male applicants. The slight difference can be explained by the fact that there were a higher proportion of male applicants within the Secondary Sector and fewer opportunities to offer voluntary exits because of the more specialised skills requirements.

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**15. I am not happy that I have not been successful – what can I do about that?**

There is no appeals process against the panel's decision and it is hoped that you believe the process was fair and transparent. However, if you have evidence to demonstrate that the selection process has not been followed correctly in your case, you may raise the matter through the Departmental Grievance procedure, using HR Form 082: Submitting and Recording Grievance and Complaints. Guidance on the grievance procedure has been placed on the SCE Website. Formal grievance should be submitted to the DCYP-Estabs-Mailbox@mod.uk.

**16. If I was unsuccessful, can I apply for VERS in the future?**

Yes – there will be VERS exit schemes for 2016 and 2018 departures.

**17. Can I depart early with VERS compensation before August 2015?**

We are not envisaging a further significant fall in pupil numbers before the end of the Summer Term in 2015 therefore we would not plan to release anyone before 31 August 2015.

You should be aware that if you have been offered and accepted VERS and you find another job outside of SCE, you will not be released with an early VERS payment and would need to resign and forfeit your VERS compensation if you needed to leave before August 2015.