# LEADERSHIP APPOINTMENTS

# GUIDANCE FOR GOVERNORS

# A Vacancy Arises

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| **What the governors need to do** | **Notes for governors** |
| The chair of governors or clerk will: **1.1** Notify both Diocese and the LA of the vacancy |  |
| **1.2** Make contact with the Diocese and the LA school adviser to discuss the appointment procedures and identify possible dates for the initial meeting and subsequent process | Contact the Advisers to discuss the procedure, timescales etc. |
| **1.3** Agree the date and make arrangements for the initial meeting of the full governing body | Invite all members of the governing body to the ‘initial meeting’ except possible internal candidate. |
| **1.4** Agree when to hold the governors’ meeting to ratify the appointment |  |
| **Allow 1 Week** | |

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**to assist governors of church schools in appointing a headteacher, deputy or assistant headteacher**

# The Initial Meeting

For headship, the initial meeting is a formal meeting of the full governing body and decisions about salary should be minuted.  It should **not** be delegated to a committee of the governors.

**Timescale**  
Governors should ‘work backwards’ when setting the timescale, as successful candidates are required to give two to four months notice:

* By the end of October for appointments commencing in the spring term
* By the end of February for appointments commencing in the summer term
* By the end of May for appointments commencing in the autumn term
* **For candidates who are serving headteachers, an additional month’s notice is required.**

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| **What the governors need to do** | **Notes for governors** |
| **2.1**  Confirm vacancy | The advisers will provide a general overview of the appointment process |
| **2.2**  Note the appointment is made by the full governing body | Agree arrangements for any ratification meeting that is required. |
| **2.3**  Take note of the:   * Appointment procedure * Employment legislation * Equal opportunity policy * Confidentiality * Safer Recruitment Guidance | The advisers will give an overview of the issues and their implications |
| **2.4**  Agree job description   (See Annex 1) | A Model/generic job description is provided for your consideration |
| **2.5**  Discuss and agree person specification/selection criteria using Annex 2 and Annex 3 provided | Need to decide the contents of the document and whether each criterion is essential or desirable |
| **2.6**  Agree use of confidential references | Agree the use of references. Other information from ‘other sources’ should not be sought by individual governors |
| **2.7**  Agree salary range | The LA provide relevant information to enable governors to decide on appropriate salary at which to advertise the post |
| **2.8**  Decide how to advertise the post | The governing body is asked to agree the wording for an advertisement in the national press. Usually headteacher & deputy headteacher posts are advertised (in print) throughout England & Wales, but the governors can decide to do otherwise.  Advice from the LA and Diocese should be taken before deciding not to advertise.  NB This may be delegated to a small committee. |
| **2.9**  Give early consideration to time scales for shortlisting, pre-interview visit, interviews, venues and ratification of appointment | Check when advert must be with LA Where possible please allow   * 5 working days between closing date & short-listing * 10 working days between short-listing & interviews |
| **2.10**Decide on the information to be sent to applicants | This is likely to include:   * A copy of the advert wording * Letter from the Chair * Letter from the pupils or school council * Copy of a school newsletter * Relevant information about the school (often contained in the school brochure) * Details of the post * Key dates in the selection process * Arrangements for any pre-application visits to the school * Application form * Person specification * Church criteria (VA, Foundation Schools & Academies * Job description * Parish / church  magazine * Equal opportunities monitoring form * Information about the LA * Information about the Diocese * Information about the local area * Reference to the school’s Child Protection Policy & Attendance Policy   Any other information the governors feel would give a flavour of the school and attract interested candidates to apply |
| **2.11** Discuss and agree the composition of the appointment panel and the selection procedure | Discuss the procedure to be used at interview and number and range of governors to be involved.  Governors taking part should ideally be available for the whole selection process |
| **Following this meeting** | **Chair of Governors to**   * confirm advert wording with the advisers * ensure any documentation required is forwarded to the LA * arrange an interview venue * check whether any governors not involved in this meeting are to be involved in future parts of the process * send all governors notification of the ratification meeting * forward the ‘letter from the chairman’ to the LA (for inclusion in the packs)LA to * place advert * send out packs on request * send copies of all applications to all governors following the closing date * LA Adviser to confirm advert wording with Chair of Governors   **Diocesan Adviser to**   * Inform DBE of dates   **Advisers and Governors to**   * examine each application, the form and the letter of application, against the criteria agreed at the initial meeting |

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# Shortlisting Meeting

In preparation for the shortlisting meeting, governors will be sent the following:

* A copy of the agreed job description and person specification as sent to the candidates
* A copy of each candidate’s application.

Governors should examine each application, the form and the letter of application, against the criteria agreed at the initial meeting

**Note:** *The governors should not convene any additional meeting (formal or informal) for the purpose of considering applications without notifying the Local Authority and the Diocese.*

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| **What the governors need to do** | **Notes for governors** |
| **3.1**   Prior to the meeting the governors (individually) need to analyse all applications against the agreed selection criteria | Applications should be carefully checked to ensure that they fulfil all essential criteria.  Original applications and any notification of criminal background are normally sent direct to the Chair of Governors |
| **3.2**    Agree:   * Confidentiality/equal opportunities * Shortlisting procedure |  |
| **3.3**   Conduct initial screening to exclude any candidates who do not meet essential criteria | Advice will be offered on the shortlisting process |
| **3.4** Consider all other applications against the agreed selection criteria and decide whether to:   * Create a shortlist or * Re-advertise |  |
| **3.5** Finalise selection procedure, including:   * Tasks * Areas of questioning * Use of references * Composition of panels * Interview arrangements | Decide on activities, interviews etc, including the use of presentations, tasks and confidential references.  It is important that the letter to candidates makes it clear whether the first day of a 2-day process is part of the selection process or not. If the governing body wish to include activities on that day (e.g. talking to school council) and these will be used to inform the decision, then the candidates need to be aware of this |
| **3.6**   Agree whether governors not present at the short-listing should participate in the interviews |  |
| **3.7**   Agree arrangements for pre-interview visit for shortlisted candidates to the school | Decide who will be involved in the pre-interview visit. Usually Chair of Governors or a delegated governor with the visit taking place the afternoon before the formal interviews. Possible format:   * complete CRB documentation and other checks (qualifications & identity) with support from school admin staff * tour of the school in action * meet pupils * opportunity for candidates to seek information & clarification from the chair of governors |
| **3.8**   Invite candidates for interview | LA will do this on behalf of the governing body |
| **Following this meeting** | **Chair of Governors to**   * confirm arrangements with the interview venue and confirm any technology requirements * confirm arrangements for the pre-interview visit   **LA to**   * write out to all short-listed candidates inviting them to interview and including a CRB form * request confidential references (individual & LA references) * confirm interview arrangements with the governing body * forward references to the adviser by the day before the interviews * check any reasonable adjustments required by candidates to allow them to access the interviews   **LA Adviser to**   * prepare some possible questions for different panels & the whole governing body to consider.   **Diocesan Adviser to**   * obtain faith references (all aided schools and certain other schools - obtain advice from the DBE) * prepare some possible questions for the whole governing body to consider.   **Governors to**   * re-read the person specification and job description * consider important areas to be covered at interview * consider areas for questions |

[Go to Step 4](http://www.chester.anglican.org/page_schools.asp?Page=465)

. Headteacher and deputy headteacher appointment - Step 4

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# Interviews

*Assuming a two stage process*

In preparation for the interview day the governors should:

**Re-visit the agreed person specification form, noting the essential and desirable criteria.**

1. Note areas to be covered at the interview.
2. Re-examine each application against the information requested, noting areas requiring further explanation / information.
3. Re-read the school information pack and any other material relating to the needs of the post.
4. Consider areas for questions.

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| **What the governors need to do** | **Notes for governors** |
| **4.1** Confirm arrangements for the day, including:   * The roles of governors and advisers * The need for confidentiality/equality of opportunity * Questions * Conduct of interviews | Decide how candidates will be ‘graded’ after the panel interviews and how these grades will be used by the full interview panel. |
| **FIRST STAGE** | |
| **4.2** Conduct the first stage/panel interviews (if used) |  |
| **4.3** Discuss strengths and weaknesses of candidates and decide which, if any, to take forward to the second stage | It is possible to shortlist only one candidate providing they meet the essential criteria laid out in the person specification |
| **4.4**   Decide on the format of the afternoon and questions to be asked |  |
| **4.5**   Agree how and when the unsuccessful candidates will be informed of the governors’ decision not to continue with their application | The advisers and/or the chair of governors will inform unsuccessful candidates and the advisers will arrange to give professional advice and feedback to unsuccessful candidates |
| **SECOND STAGE** | |
| **4.6**  Conduct the second stage interviews |  |
| **4.7**   Discuss the strengths and weaknesses of the candidates in relation to the selection criteria and decide whether to appoint or to re-advertise the post using the confidential references to confirm the decision |  |
| **4.8**   Agree whether to appoint | If no appointment is to be made consider:   1. Timetable for a new round 2. Date for a new initial meeting 3. other possible arrangements e.g. collaboration with another school |
| **4.9**   Decide how unsuccessful candidates will be informed |  |
| **4.10**   Conditionally offer the post to the successful candidate subject to ratification:   * Confirm start date and salary * Check identity |  |
| **4.11** Governing body meets to ratify the appointment   * Consider induction arrangements * Confirm the offer of appointment with the candidate (subject to CRB & other checks) | Chair of governors completes documentation after the appointment has been ratified. |
| **4.12** Determine how and when any governors not present, the school community and the parents will be informed of the appointment |  |
| **4.13** Ensure all notes, application forms and  letters of application are given to the LA adviser | The LA adviser will store/dispose of all papers as appropriate and provide feedback to unsuccessful candidates |
| **Following this meeting** | **Chair of Governors to**   * liaise with the appointee re. announcements about the appointment * support the headteacher’s induction and CPD (continuing professional development)   **Diocesan adviser to**   * notify DBE   **Governors to**   * support the headteacher’s induction and CPD |