

BELS Director's Report to Governors

SPRING 2024

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***DEVELOPING
THE
EFFECTIVENESS
OF
YOUR
GOVERNING
BOARD***

1.	MESSAGE FROM BELS CHIEF EXECUTIVE AND DIRECTOR OF EDUCATION AND LEARNING
Summary	<p>Welcome back, I hope everyone managed to have an enjoyable festive break.</p> <p><u>School Budgets</u></p> <p>This is always a very important term for governors with the setting of the school budgets for 2024-25. During January, the Schools Forum and the Cabinet of Barnet Council received reports on school funding for 2024/25.</p> <p>The Dedicated Schools Grant (DSG) is paid in support of the LBB schools' budget and is the main source of income for the schools budget. Local authorities are responsible for determining the split of the grant between central expenditure and the individual schools budget (ISB) in conjunction with local schools forums. Local authorities are responsible for allocating the ISB through the ESFA Authority Proforma Tool (APT) to individual schools in accordance with the local schools' funding formula. The London Borough of Barnet mirrors the National Formula Funding values in its local funding formula and will continue to do so in 2024-25.</p> <p>The DSG is made up of four blocks:</p> <ul style="list-style-type: none"> • Schools Block (SB) • Early Years Block (EYB) • High Needs Block (HNB) • Central School Services Block (CSSB) <p>The Schools Block (SB) allocates funding for pupils in Reception to Year 11 in state-funded mainstream schools and academies.</p> <p>The Early Years block (EYB) funds early education entitlements for 2-, 3- and 4- year-olds in private, voluntary, and independent settings, maintained nursery schools and school nursery classes. In 2024-25, the 2-year-old funding has been extended beyond disadvantaged families to include 2-year-olds of working parents and new funding for children of 9 months up to 2 years old, of working parents.</p> <p>The High Needs Block (HNB) supports provision for vulnerable children and young people, mainly those with special educational needs and disabilities (SEND) from their early years to age 25, enabling both local authorities and institutions to meet their statutory duties under the Children and Families Act 2014.</p> <p>The Department for Education (DfE) created a Central School Services Block (CSSB) in 2018/19, using the baseline of the schools block in 2017/18. The CSSB covers funding for historic commitments and funding for ongoing and statutory responsibilities. The DfE announced allocations of the gross DSG to local authorities on 19th December 2023. The figures confirm the Schools Block and the Central School Services Block. However, the High Needs Block and the Early Years Block are indicative at this stage and will change during 2024. The net DSG allocation to the local authority shows that there is growth across all four blocks as follows:</p> <ul style="list-style-type: none"> • Schools Block - £6.026m (3.7%) • High Needs Block - £2.077m (3.0%) • Early Years Block - £13.934m (44.4%)

	<ul style="list-style-type: none"> Central School Services Block - £0.115m (4.9%) <p>TOTAL = £22.152m (8.3%)</p> <p>Allocations by block</p> <p>Schools Block - The 2024/25 SB Income is based on the following rates:</p> <ul style="list-style-type: none"> £5,425 Primary unit of funding based on 29,353 primary pupils (October 2023 census) £7,129.1 Secondary unit of funding based on 23,635 secondary pupils (October 2023 census) £5.386m of funding for Pupil Growth and Premises factors <p>TOTAL = £333.129m (Gross funding – subject to deductions for recoupment and NNDR)</p> <p>Central School Services Block – The 2024/25 CSSB for Barnet includes the following:</p> <ul style="list-style-type: none"> £2.333m – allocation for ongoing responsibilities (includes retained duties, admissions, licensing and Schools Forum administration) £0.152m – Historic commitments allocation, a 20% reduction from 2023/24. <p>TOTAL = £2.485m</p> <p>Early Years Block – The Early Years Block is estimated using early years numbers taken from the Early Years and Schools census in January 2023. An update to the 2024/25 EYB allocation will be made once the January 2024 Early Years and Schools census numbers are finalised. The allocation will be updated in July 2024 based on the January 2024 census numbers. For 2024 to 2025, the 95% pass-through requirement will apply separately to the entitlements for:</p> <ul style="list-style-type: none"> 9-months-old children up to 2-year-olds of working parents 2-year-old children of working parents 2-year-old children from disadvantaged families 3 and 4-year-olds (universal and additional hours) <p>For 3 and 4-year-olds, there is no change, and the pass-through requirement will apply to the universal and additional hours in combination. However, for 2-year-olds and under, the requirement will apply to each of the entitlements individually. It has been confirmed that the hourly rate received by Barnet for 3- and 4-year-olds has increased from £6.41 to £6.74. The DfE funding rate for 2-year-olds disadvantage entitlement has been increased by £2.67 from £6.92 to £9.59. In 2024-25, early years funding was extended to 2-year-olds of working parents and children under 2 year olds. Additionally, £11.079m was allocated for this purpose. These children will also attract early years pupil premium and disability access fund.</p> <p>TOTAL = £45.324m</p> <p>High Needs Block (HNB) - The provisional HNB income for Barnet has been calculated as follows:</p> <ul style="list-style-type: none"> £70.794m - High Needs National Funding Formula allocation £4.696m - based on a £5,194.16 per pupil Area Cost Adjustment (ACA) weighted base rate * 904 (pupils in special schools/special academies based on the October 2023 census) £1,248m - Import/export adjustment for net 208 imported pupils
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- £0.940m – hospital education and teachers’ pay and pension

TOTAL = £77.678m (Gross funding – subject to deductions for high needs place funding)
The final import/ export adjustment data will be amended based on January 2023 School and FE providers’ High Needs pupil census data.

The council recognises that schools (particularly primary schools) continue to face significant budgetary challenges. Smaller primary schools and schools with falling rolls are facing the greatest challenge.

The Schools Forum took a decision that is designed to provide some relief in respect of funding challenges both this year and in 2024/25. The previous agreement to allocate up to £1 million from DSG reserves to support schools with additional costs arising from the enrolment, after the October 2023 census date, of children of asylum seeker families living in designated asylum seeker hotels and from Israel and Gaza, has been expanded to include some additional funding if these new arrivals require additional support due to SEND. We hope this will alleviate some of the cost pressures on schools arising from enrolments of migrant children who have additional needs.

An increasing number of LA maintained schools are being faced with urgent repairs to their buildings which are not able to be funded by their own school budgets due to their own budgetary restraints. Paying for such repairs from the school budget would mean that their projected deficit grows leading to difficulties in achieving a balanced position at the end of three years. In the past, Schools Forum have agreed to fund such repairs as they are ‘Exceptional Circumstances’. Schools Forum have now agreed to allocate £200,000 per year, for the next three years, from the DSG reserves, to fund such urgent repairs. A proposal for funding would be considered if the following criteria were met:

- The school buildings are maintained by the LA
- The school does not have the necessary funds to meet these repair costs i.e. they are in a deficit position or these repairs would place the school into deficit
- The repairs are deemed essential (by the LA) and are exceptional and unforeseen
- The repairs are not the result of ineffective maintenance by the school
- The repairs are not covered by the funding the schools get directly for maintenance and repair (Devolved Capital Funding)
- It is a revenue cost and cannot be capitalised
- The £200,000 allocated for the year has not been used up

In October 2023 the Schools forum again agreed to de-delegate money into the “Schools Contingency” pot to fund schools for unforeseen circumstances when the school’s budget share was initially determined; an example of the use of contingencies would be the funding of additional NNDR (business rate) costs following a revaluation. Financial support for schools making redundancies in order to recover a deficit is also funded from here. With the current financial challenges schools are likely to depend on the support of this contingency pot.

BELS and the council finance team will continue to offer advice and support to schools who face financial difficulties over the next year. If your governing body believe a structural change may be necessary in ensuring the school’s financial sustainability please get in touch with me in the first instance. This may involve a federation with another school, an amalgamation, joining a Multi Academy Trust, or sharing leadership across more than one school to reduce staffing costs.

We will be discussing school budgets at the Director’s Briefing with Chairs and Vice-Chairs on 8th February.

	<p><u>Ofsted Inspections</u></p> <p>You will be aware of the pausing of Ofsted Inspections at the start of this term due to the additional training that all inspectors are undertaking following the outcome of the Coroner's Inquest following the death of Ruth Perry in January 2023 and the Coroner's Report which stated that the Ofsted inspection of her school contributed to her death. The new Chief Inspector of Ofsted, Sir Martyn Oliver, halted inspections while new mental health training was rolled out to inspectors. Inspections resumed on 22nd January.</p> <p>I hope your experience is that BELS gives the necessary support and advice to your school leaders and to you as governors, about the Ofsted Framework and is there to support schools through an inspection. There were 15 Ofsted inspections of Barnet schools last term and I'm pleased to report that all of these resulted in a judgement of either Good or Outstanding. Well done to the governors who were involved in any of these. We always have an Ofsted update at the Director's Briefing with Chairs and Vice Chairs and hear back from governors who have recently been through the experience.</p> <p><u>Brian Salinger</u></p> <p>Finally, you may have seen the really sad news that former Council Leader and Mayor of Barnet, Brian Salinger, passed away on 21 December. Brian has been a governor and Chair of Governors of many schools over the last 30 years or so, most recently Moss Hall Nursery School and The Pavilion and Northgate PRUs. Many of you would have known Brian and worked with him in some capacity. He was first elected a Conservative councillor in 1986, representing Friern Barnet Ward and, after boundary changes, Oakleigh Ward. In 2005, Brian was elected Leader of the Council and during this time he oversaw housing regeneration schemes on the borough's four largest estates, and the Primary Schools Investment Programme which led to a number of primary schools being re-built. Brian retired at the end of his mayoral year 2017-2018 as the 53rd Mayor of Barnet. More recently he oversaw the rebuilding of the Pavilion PRU into a modern state of the art new building. He also represented the borough on Jesus Hospital Charitable Trust, an Almshouse Charity, and the Valentine Poole Charity.</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	<p>Neil Marlow Chief Executive and Director of Education and Learning Barnet Education and Learning Service (BELS) Email: neil.marlow@barnet.gov.uk</p>

2.	GOVERNOR TRAINING PROGRAMME
Summary	<p>The Governor Training Programme has moved to a new platform - found HERE. Please see Appendix 1 for help to create an account and begin registering for courses. If you require assistance, please contact BELS.Training@barnet.gov.uk.</p> <p>This term's Governor Training programme has been published and can be found at https://www.belstradedservices.uk/governorservices.</p> <p>Courses this term:</p> <ul style="list-style-type: none"> e-Safety for Special Schools Induction for Newish Governors Exclusion Independent Review Panels Financial Management for Maintained Schools Safeguarding Forum: Governors Role in Ensuring the Wellbeing of Staff and Pupils Raising Achievement for SEND Pupils The Ofsted Framework Discussion Forum for Chairs and Vice Chairs Safeguarding: Safer Working Practices and Reporting Concerns Safeguarding for All Governors Complaints Handling, Panel Hearings and Appeals The Role of the Parent Governor Ofsted Ready: Interview Prep Session <p><i>Any price shown on the portal will reduce to zero when checking out for subscribing schools.</i></p> <p>Succession planning through governor training: By ensuring governors are upskilling, the Chair will build an effective board, from which future leaders will naturally emerge. A training log can be used to record the training undertaken by governors. The annual Governance Audit / skills audits can be used to evaluate skills gaps and training needs. Appointing a Designated Governor for Training to keep track of this is advised. Chair-specific training can also be undertaken by existing or aspiring chairs and vice chairs.</p> <p>Lack of training as grounds for suspension: The DfE's Governor Handbook lists a lack of training as grounds for suspension of a governor. Your Governing Board's code of conduct will also highlight expectations around governor training. It is important that new governors understand these expectations. Our induction training will cover this, along with other essential information for new governors. Please continue to take advantage of the local intelligence and expertise on offer.</p> <p>Subscribing schools also have access our advice service, including procedural and constitutional compliance, termly governor updates, support with elections, governor recruitment, chair mentoring, etc.</p> <p>Please ensure we have the correct contact information for your Chair and Vice Chair to continue receiving updates.</p>
Governors' Role	<p>To note the above information.</p>
For action by	<p>All Governors</p>
Contact	<p>George Peradigou Governor Services Barnet Education and Learning Service (BELS) Email: george.peradigou@barnet.gov.uk</p>

3.	GOVERNOR HANDBOOK FOR CHILDREN IN CARE
Summary	<p>Governors and trustees are recommended to read this useful guide, produced by BECOME – the Charity for Children in Care and Young Care Leavers, and tailored for school governors.</p> <p>The guide is a short handbook that tells you what you need to know about children in care (CIC). It explains the basics quickly and clearly, as well as giving sensible questions for governors to ask.</p> <p>Full of the latest knowledge from both a national charity and local school perspective, it covers CIC from EYFS classes all the way up to Year 13. It applies to both academies and local authority schools.</p> <p>Whilst it is perfect for governors, expert feedback told us that it's also great for:</p> <ul style="list-style-type: none"> • school leaders • teachers • support staff • others who work to support our pupils
Governors' Role	To note the above information.
For action by	All Governors
Contact	Sarah Deale Headteacher, Barnet Virtual School Barnet Education and Learning Service (BELS) Email: Sarah.Deale@barnet.gov.uk

4.	HOW OFSTED INSPECTS SAFEGUARDING IN SCHOOLS
Summary	<p>Ofsted recently published a blog on how it inspects safeguarding in schools. The blog explains some of the main activities Ofsted will conduct when undertaking inspections of safeguarding and why. It includes details of what will happen before and during the inspection and how Ofsted will make a judgement about safeguarding. It also goes into detail about the single central record and the conversations that will be held with the DSL, pupils and staff members. For the full blog post please see below.</p> <p>How we inspect safeguarding in schools - Ofsted</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	Liam Foote School Safeguarding Lead Barnet Education and Learning Service (BELS) Email: liam.foote@barnet.gov.uk

5.	STAFF WELLBEING SURVEY
<p>Summary</p>	<p>The below text was useful for those schools designing a staff wellbeing survey so we thought we would share here:</p> <p>General Wellbeing:</p> <ul style="list-style-type: none"> • How are you? • How are staff managing their current workloads? • Do we have a wellbeing policy or action plan? <ul style="list-style-type: none"> ◦ If your school does, how is progress towards objectives monitored? • How many members of staff have been trained to offer support as mental health first-aiders (or equivalent)? • What are we doing to promote the wellbeing of the senior leadership team (SLT), staff and pupils? • What measures do we have in place to offer support in the event of a bereavement? • When you review a policy, ask if it reflects our wellbeing practices. <p>If school responses show staff wellbeing is an issue, be clear on where you can direct them for support, including:</p> <ul style="list-style-type: none"> • The headteacher (if appropriate - for example, if a staff member is struggling with their workload) • Their GP • Education Support • Mind • Rethink Mental Illness • Mental Health Foundation • Together • BACP Find a Therapist Directory <p>In terms of supporting school leaders, the board could review the frequency and duration of meetings, the level of information required from senior leaders, and the structure of Q&A – reading papers before the meeting and sending questions/challenges ahead of the meeting allows staff to better prepare.</p> <p>Your school doesn't have to have a wellbeing policy or action plan, but wellbeing should be feature somewhere (e.g. in your school improvement plan).</p> <p>Wellbeing initiatives</p> <ul style="list-style-type: none"> • What initiatives do we have in place for wellbeing (both for pupils and staff)? • Has our school looked into any new wellbeing initiatives? • What wellbeing initiatives have you chosen to introduce and why? • What is the evidence that this new initiative is needed? • Will this initiative require additional resources (time and money)? • What is the expected impact? • Does the resource the initiative requires justify the expected impact? • What data/evidence will we expect to see to show the initiative's impact? • What progress has been, or is being, made towards this initiative and our wider wellbeing objectives/vision? • What initiative are you planning to implement next? • How have you considered the wellbeing of the senior leadership team (SLT) when implementing initiatives?

- If workload is a problem: have you used the Department for Education's (DfE's) [workload reduction toolkit](#) to look into workload issues?

You'll want to hear that wellbeing initiatives for both pupils and staff are being looked into and/or are already in place. This will show you that your school is taking wellbeing seriously.

You'll want to be assured that wellbeing initiatives aren't being implemented randomly or for the sake of it, and that school leaders understand why they're implementing a particular initiative, how it's going to make a real difference in your school, and how they can measure its impact.

Staff wellbeing

- How are staff doing? How do you know?
- How are you monitoring staff wellbeing?
- How do you know if a staff member is struggling? And what do you do about it?
- Is there a member of the SLT who has responsibility for staff wellbeing in the school? If not, is there a wellbeing point of contact or another way you monitor wellbeing?
- Do staff know what support is available to them? Do they know where they can go for help, in school and beyond (for example, do they know how to access counselling and support services)?
- What is our staff absence rate? Is it going up? Why? Is this due to issues around workload and wellbeing?
- What support is in place to assist the wellbeing of particular post holders?
 - Some roles, for example, senior leaders or the designated safeguarding lead (DSL) can be especially stressful, so support such as mentoring can be particularly helpful
- Do we have coaching and/or mentoring in operation at the school? If not, how else are staff supported and given the chance to offload?
- What training/support do we offer on wellbeing?
- Do staff have the chance to get together informally? What's the quality of the relationship between staff?
- How are staff consulted when it comes to big changes or new initiatives?
- Are staff proud to work at this school?
- What do school leaders do to model a healthy work-life balance?
- How is communication managed?
 - For example, is there a working hours-type policy/agreement to manage how parents communicate with staff?
- How are staff supported in dealing with behaviour incidents?
- How many staff are on support plans and how are they being actively supported?
- How do you measure staff effectiveness?
- How do staff know they're doing their job effectively?
- How do staff receive feedback?
- Do you know your staff's strengths?
 - For example, do you know who is good at building relationships with tricky parents?
- How are staff members' strengths and skills shared and celebrated? Does this form part of the school's CPD?

You'll want to know that there's a member of the SLT who has responsibility for staff wellbeing within the school – or if not, that there's a system in place to make sure staff

wellbeing is monitored. For example, your school might have a wellbeing group that meets regularly to discuss suggestions from staff, and liaises with the SLT.

You also want to hear that staff know how to access counselling and support services (for example, from organisations such as [Education Support](#) or an occupational health service within the local authority).

Your school leaders should refer to evidence, such as surveys and absence rates, to support what they say about staff morale and wellbeing.

For example, if the overall staff absence rate - or the absence of any individual staff member - is increasing, your school leaders should be able to explain whether this is due to wellbeing issues/concerns, and how they know.

Staff turnover

- What is our staff turnover rate?
- Do you know why our staff turnover rate is X%?

If your school's turnover rate is above 30% over the last 5 years, ask:

- Do we know why staff leave?
- Does our exit interview process include a question on why the staff member has decided to leave? For example, is it due to high workload?
- Do we need to review any job descriptions/list of duties as a result?
- Do you have a plan in place to reduce staff turnover?

Your school leaders should be able to explain why staff members leave, and if there are any trends in your turnover figures. For example, have a lot of members left at the same time for similar reasons?

If turnover is a problem for your school, your school leaders should be considering or implementing action plans or other measures to tackle the problem. For example, if a lot of staff leave because their responsibilities in reality differed from what they expected, your school may need to conduct a review of job descriptions and adverts.

Career development

Staff wellbeing can suffer if they feel they aren't being given the chance to develop and progress in their career. So, CPD is an important part of maintaining staff wellbeing.

- What development opportunities are in place for staff?
- How are you growing talent?
 - For example, how is your school preparing the next generation of middle leaders?
- How are CPD and other opportunities personalised? Is CPD bespoke and tailored to individuals?
- How well do you know your staff members' aspirations?
- What whole-school CPD do you have in place and what needs is it meeting? How do you identify needs for whole-school CPD and evaluate its impact?

Your school leaders should be able to explain how they are tailoring CPD to individual staff members' needs and aspirations, and how they are preparing them for the next step in their career (for example, by helping them learn about leadership).

	<p>To show what CPD opportunities are in place, they may refer to the number of staff sent on a leadership courses, for example National Professional Qualifications (NPQs), and/or given informal opportunities to shadow employees in senior positions.</p> <p>Pupil wellbeing/the curriculum</p> <ul style="list-style-type: none"> • How do you support pupil wellbeing? • How is wellbeing promoted and nurtured in the curriculum and other activities? • How are pupils taught about mental health and wellbeing? • What has been the impact of any pupil wellbeing initiatives? <p>Your school leaders should be able to assure you that wellbeing is a key part of the curriculum that all pupils can access.</p> <p>They may refer to initiatives or activities, such as play therapy or forest schools, which promote wellbeing.</p> <p>School leaders should include evidence, such as attendance or behaviour rates, to demonstrate whether wellbeing initiatives have had a positive impact on pupils.</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	George Peradigou Governor Services Barnet Education and Learning Service (BELS) Email: george.peradigou@barnet.gov.uk

6.	SCHOOLS FINANCIAL VALUE STANDARD (SFVS)
Summary	<p>Around this time of year, we receive enquiries from governors with finance responsibilities about how schools should complete their Schools Financial Value Standard (SFVS) and Assurance Statements.</p> <p>Please see link below where you will find the template as well as guidance.</p> <p>Schools financial value standard (SFVS) and assurance statement - GOV.UK (www.gov.uk)</p> <p>This guidance helps schools and local authorities meet basic standards for good financial health and resource management.</p> <p>Our Financial Management for Maintained Schools course will cover this and more. Be sure to join us.</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	Rema Tiba Accountancy Officer - Schools Children's and Family Services

	rema.tiba@barnet.gov.uk
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7.	GUIDANCE ON GENDER QUESTIONING CHILDREN
Summary	<p>The Department for Education in the UK recently issued new non-statutory guidance for schools and colleges on supporting students under 18 who are exploring their gender identity. This guidance was published on 19 December and is presently in draft form, open for consultation.</p> <p>The guidance is designed to provide practical advice for educational settings on handling situations involving gender-questioning children. The guidance also aims to assist teachers in acting in the best interests of children and clarifies that schools and colleges are not obligated to accept all requests for social transition and should adopt a cautious approach, including consultation with parents.</p> <p>Education Secretary Gillian Keegan emphasised the guidance prioritises the best interests of all children and the role of parents in significant decisions. Minister for Women and Equalities, Kemi Badenoch, stated the guidance gives teachers confidence in handling gender questioning issues and clarifies the role of schools in social transition requests.</p> <p>Ofsted Chief Inspector Amanda Spielman welcomed the guidance, noting its importance in helping schools support gender-questioning pupils and others.</p> <p>Key points of the guidance include:</p> <ul style="list-style-type: none"> • Social transition should be extremely rare, with appropriate safeguards and considering the child's best interest. • Schools must not compromise safety in physical sports or single-sex spaces by allowing children of the opposite sex to participate. • Single-sex schools can refuse admission to pupils of the opposite sex, regardless of gender questioning. <p>The guidance is open to a 12-week consultation with parents, teachers, and school leaders encouraged to respond. Governors and trustees can have their say! For further information please visit GOV.UK for the press notice and full draft guidance and consultation.</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	George Peradigou Governor Services Barnet Education and Learning Service (BELS) Email: george.peradigou@barnet.gov.uk

8.	GOVERNOR SERVICES SURVEY FEEDBACK AND ACTIONS TAKEN
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Summary	<p>Thank you to those who took the time to respond to our satisfaction survey. The results were very positive overall with much recognition of recent efforts and improvements to the service. This was gratefully received!</p> <p>There were also some constructive comments that we wanted to address below and report on how we are responding:</p> <ul style="list-style-type: none"> • Difficulties with creating a new log in for the new training portal: As with any new system, we expected some teething issues. We've attached guidance in the appendix for how to log in the first time. If you still have any issues, please contact BELS.Training@barnet.gov.uk. • Requests that courses be published earlier: While this sometimes depends on external factors, you'll see that we have already published many of the Summer Term 2024 courses, so this is well under way! • Requests for targeted courses: These are courses that would target only a select group of governors/schools. The issue we traditionally had with these was low attendance, which made delivery financially unviable. However, with the move to delivering more training online, we've started to work with neighbouring boroughs to relaunch these types of courses. You'll be seeing more of these in the governor training programme. For example, this term, we have joined up with Enfield Council to deliver the 'e-Safety for Special Schools' course, which is targeted at special school governors. • Some Governors felt that the service should be offered free of charge: While we do offer some free sessions and information, such as the termly Director's Briefing for Chairs and Vice Chairs and the Director's Report, we are a traded service requiring subscription. However, with your subscription, comes other money saving opportunities - for example, subscribing schools pay £197 for Governor Hub instead of the £400+ they would pay directly, as well as discounts on NGA membership and Modern Governor. We also use our connections to help subscribing schools secure an efficient and cost-effective clerk. • Requests to reintroduce the Level 3 Safeguarding course: While the new guidance doesn't distinguish levels, we have agreed to reintroduce a Safeguarding course which is targeted at Designated Safeguarding Governors to go above and beyond that offered to all governors in our current series of safeguarding courses. Please see the next item for details on this.
Governors' Role	<p>To note the above information.</p>
For action by	<p>All Governors</p>
Contact	<p>George Peradigou Governor Services Barnet Education and Learning Service (BELS) Email: george.peradigou@barnet.gov.uk</p>

9.	SAFEGUARDING FOR DESIGNATED SAFEGUARDING GOVERNORS
Summary	<p>Responding to governors' requests, we are introducing the course Safeguarding for the Designated Safeguarding Governor. This is scheduled to take place next term and has come about in response to requests from numerous Designated Safeguarding Governors for a course which provided a deep dive into their responsibilities.</p> <p>Whilst open to all governors, this is targeted at current or aspiring Designated Safeguarding Governors.</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	<p>George Peradigou Governor Services Barnet Education and Learning Service (BELS) Email: george.peradigou@barnet.gov.uk</p>

10.	SCHOOLS IN FINANCIAL DIFFICULTIES PANEL
Summary	<p>The Schools Forum has established the Schools in Financial Difficulties Panel for Maintained Schools and agreed its terms of reference in April 2023.</p> <p>The Panel's role is to:</p> <ol style="list-style-type: none"> Receive information on Schools in Financial Difficulty Be a conduit for information sharing between Finance, School Improvement, and Internal Audit Teams Hold the finance team to account for ensuring due process is adhered to for schools in financial difficulty. Hold schools to account for ensuring actions identified as part of a deficit recovery plan are adhered to. <p>The Panel aims to:</p> <ol style="list-style-type: none"> Ensure there are robust procedures in place to support schools that are in financial difficulty. Ensure there are action plans in place for both Council officers and head teachers for schools that are in financial difficulty. <p>The Membership of the Panel is open to Council Officers (Finance and Audit), BELS Officers, Schools Forum Representatives, and Maintained School Representatives. The Panel is Chaired by the CE and Director of Education and Learning (BELS).</p> <p>There are three meetings per year which are held online via MS Teams and outcomes are shared with the Schools Forum, Schools Finance Group, and School Budget Working Group. We are looking for more governors to join this panel.</p>

	If you would like to express an interest in joining the panel, please inform Neil.Marlow@barnet.gov.uk or George.Peradigou@Barnet.gov.uk .
Governors' Role	To note the above information.
For action by	All Governors
Contact	Neil Marlow Chief Executive and Director of Education and Learning Barnet Education and Learning Service (BELS) Email: neil.marlow@barnet.gov.uk

11.	RECRUITING SENIOR LEADERS – TOOLKIT FOR GOVERNORS
Summary	<p>Under Appendix 2 of this report, we have shared with you will find our current toolkit to guide your governing board through the process of recruiting new headteachers and senior leaders.</p> <p>The appointment of a new Headteacher is one of the most important and challenging tasks that a governing body may undertake.</p> <p>The school's Learning Network Inspector is your key point of contact during this process. BELS, together with such bodies as diocesan boards, and the school's HR provider will provide professional support through the process. For academies, we offer enhanced recruitment support for schools who purchase the Academies School Improvement Traded Service. For those who do not buy into this service we offer to attend the interview day(s).</p> <p>The guidance explores the statutory framework, including equal opportunities, and covers:</p> <ul style="list-style-type: none"> • Setting a timeline • Appointment of a selection panel • Setting the salary range • Advertisement, information pack, job description and person specification • Important Communications • Informal visit • Shortlisting • Requesting references • Choosing selection activities • The interview day • Appointment and ratification
Governors' Role	To note the above information.
For action by	All Governors
Contact	Helen Morrison Head of School Improvement and Learning Network Inspector Education and Skills Barnet Education and Learning Service (BELS) Email: helen.morrison@barnet.gov.uk

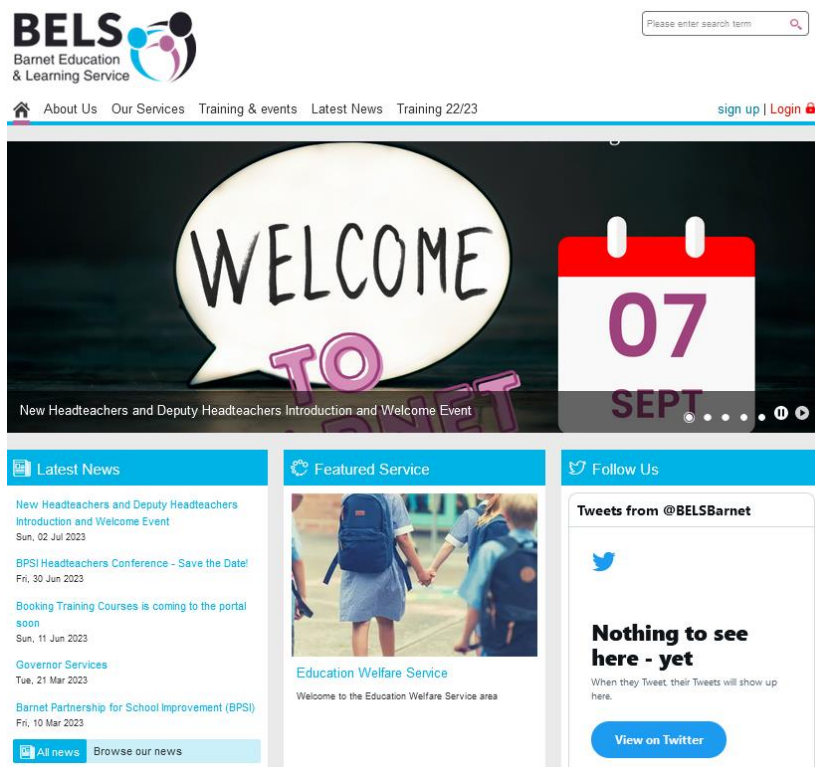
12.	THE MODERN LANGUAGE ASSISTANT (MLA) SERVICE
Summary	<p>The Modern Language Assistant (MLA) service is delivered by Des Georgiou (MLA Programme Facilitator).</p> <p>The MLA programme is open to both primary (who now have to teach a language) and secondary schools. MLAs (employed from October to May), are native speakers of French, Spanish, German and Italian who have been carefully selected to ensure they provide the best support to teachers and pupils to raise the standards in MFL. Des works very hard to facilitate a local sharing arrangement for schools wanting an assistant for less than 12 hours a week but also works with schools that want an assistant for up to 18 hours. This flexible approach ensures schools are able to receive the right amount of support for their teachers and pupils.</p> <p>The presence of an MLA in the classroom has shown to have a lasting impact: improving pupils' intercultural skills and awareness, increasing language ability and confidence among pupils and teachers, and leading to greater pupil attainment and motivation to learn new languages.</p> <p><i>'Pupils gain so much: cultural insights; increased motivation to learn languages; benefiting from building a relationship with a "real" person from the country; up-to-date knowledge about current events and culture.'</i></p> <p>Do have a look at our web page which provides an overview of the programme: Modern Language Assistants (MLAs) BELS Barnet Education and Learning Service (belstradedservices.uk)</p>
Governors' Role	To note the above information.
For action by	All Governors
Contact	<p>Des Georgiou Modern Language Assistant (MLA) Programme Facilitator Barnet Education and Learning Service (BELS) Email: des.georgiou@barnet.gov.uk</p>

Appendix 1

BELS Online Portal Guide

Logging on for the first time.

www.BELSTradedServices.uk



- Click on Login at the top right of the website.

The login button will take you to the login page with Username and Password fields. This is the same page that everyone uses to login to the SLA Online system and you are now within a secure area.

Logging in for the first time

An account has been set up with your email address but on your first visit to the portal, you will need to re-set your password.

- Click Forgotten Password?
- Enter your email address in the top box
- Click the Reset button

The system will forward a temporary password to the email address entered above (if this is a registered address).

Client Login

xxxx@xxx.xx

.....

☒ Remember my username

Login

Forgotten Password? ↑

Reset Password

Click the button below to have a new temporary password resent to your email address as entered above.

Reset

This will be delivered from **BELS | Barnet Education and Learning Service**

<support@frontlinedata.co.uk> so you may wish to save this as a contact to ensure the notifications don't go into your junk!

Confirmation

If your account exists you will be sent a temporary password to your email address. On occasion the email can take a little while to arrive. If you need access immediately please contact your administrator.

☒ Remember my username

Login

Forgotten Password? ↓

You will receive a confirmation message that you have been sent a temporary password.

- Please copy the temporary password and return to the website
- Paste the temporary password in the password box and hit Login
- You will be prompted to enter a new password and then Hit 'Save'

BELS
Barnet Education & Learning Service

Accounts | Privacy and preferences
View privacy and contact preferences

Privacy Policy

It is important that you read this privacy notice together with any other privacy notice or fair processing notice we may provide on specific occasions when we are collecting or processing personal data about you so that you are fully aware of how and why we use your data.

Controller:
(SYSTEM NAME) is the controller and responsible for your personal data (collectively referred to as (SYSTEM NAME), "we", "us" or "our" in this privacy notice).

☒ I have read and I accept the above policy [Download](#)

Security Statement

Last updated: 21/05/2021

We work hard to keep your data safe.

We use a combination of technical, administrative and physical controls to protect the security of your data. This includes using Transport Layer Security (TLS) to encrypt many of our services (so method of transmitting or storing data is completely secure, however if you are a security-related employer please see the Privacy Policy, above for details of what you can demand).

You can help us keep your data safe, as well as protect your data and other services, by never sharing your password (with anyone) and by logging out when you have finished, particularly if you are on a public device.

☒ I accept the above statement [Download](#)

[Save](#) Save my choices and proceed

[Cancel changes and go back](#)

Privacy and Security Statement

On your first log-in you will be asked to tick that you have read the Privacy and Security Policies. Both can be view and downloaded if you choose.

Welcome to the portal - you are now logged on!

If you have any issues with logging on, please contact BELS.Training@barnet.gov.uk

BELS
Barnet Education & Learning Service

Settings ? Logout

Sample Maintained Primary Sc... [v](#) [u](#)

Home Services Store Training Communication Resources Setup [Basket](#)

Welcome | Carrie @ Sample Maintained Primary School

Enter your keywords here and then click enter to search [Search](#)

2023 BPSI RESIDENTIAL HEADTEACHERS CONFERENCE

Speakers include Miranda Perry, Greg Bottrell and Clare Sealy

BPSI Headteachers Conference - Save the Date!

Quick options

- [My profile](#) Contact details and preferences
- [Manage purchases](#)
- [View purchases report](#)
- [View billing statements](#)
- [Browse training](#) and other events

Upcoming events

July 2023

Mon	Tue	Wed	Thu	Fri	Sat	Sun
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Traded Services 2023/24

[Shop now](#) through the Store

[Annual order](#) for 2023 / 24

Appendix 2

Recruiting a New Headteacher for Your School

A Toolkit for Governing Bodies

September 2023

Education and Skills



INTRODUCTION

The appointment of a new Headteacher is one of the most important and challenging tasks that a governing body may undertake. This toolkit is a way of supporting you through this process.

The school's **Learning Network Inspector is your key point of contact during this process.** BELs, together with such bodies as diocesan boards, provide professional support through the process as well as the school's HR Provider.

Useful Supporting Documents:

General Guidance:

<https://www.gov.uk/government/publications/a-guide-to-recruiting-and-selecting-a-new-headteacher>

Governor Handbook:

<https://www.gov.uk/government/publications/governance-handbook>

The Teachers' Pay and Conditions document (currently the 2022 version)

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1110990/2022_STPCD.pdf

Modification document:

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147720/Modification_of_STPCD_2022.pdf

The Headteachers' Standards (updated October 2020) document is available at:

<https://www.gov.uk/government/publications/national-standards-of-excellence-for-headteachers/headteachers-standards-2020>

This document explores:

The Statutory Framework, including Equal Opportunities

The Process:

- Setting a timeline
- Appointment of a selection panel
- Setting the salary range
- Advertisement, information pack, job description and person specification
- Important Communications
- Informal visit
- Shortlisting
- Requesting references
- Choosing selection activities
- The interview day
- Appointment and ratification

Next Steps:

- Communication with the school community/ies
- Induction for the new head

The toolkit also includes:

Example Job Description and Person Specification
Shortlisting Form

THE STATUTORY FRAMEWORK

Governing bodies of maintained schools **must**:

- **Notify the LA of a headteacher or deputy headteacher vacancy. The LA has a statutory right to an advisory place on the selection panel of Community Schools.**
- Ensure the appointment panel includes **at least three members of the governing body**, one of whom **must** have undertaken **safer recruitment training**
- For Community Schools - take the final decision on who to recommend to the LA to appoint.
- Take steps to ensure that the appointee meets the regulations regarding qualifications, health, fitness, safeguarding requirements and other grounds

The Act requires that the governing bodies of voluntary aided schools which have not accorded advisory rights to the LA for the appointment of head and deputy headteachers:

- Send a list of shortlisted candidates to the LA
- Provide as much information as possible to the LA on each person selected for interview, to enable the LA to determine their suitability for appointment
- Consider any representations the LA may make within 14 days regarding shortlisted candidates and notify the LA in writing of its response to those representations
- Take the final decision on who to recommend for appointment
- Take steps to ensure that the appointee meets the regulations regarding qualifications, health, fitness, safeguarding requirements and other grounds

Please Note:

Governors **must appoint an Acting HT** if the outgoing head leaves before a replacement is in post. Governing bodies must recruit a new headteacher as soon as is practically possible.

In the case of Barnet separate infant and junior schools sharing a site there is an obligation for governors to consider whether the schools should be amalgamated.

EQUAL OPPORTUNITIES

The school has responsibilities under the Equalities Act 2010. Barnet's Equalities Policy outlines the Council's commitment to serving diverse communities within the borough. A copy of the document is available on the Council website. In relation to recruitment, it is particularly important that the process meets the following commitments:

- To be an equal opportunities employer committed to a policy of equal access to employment opportunities, training and development, at all levels of the organisation
- To recruit and retain a workforce that reflects the expertise and diversity of our community, and ensure that recruitment and selection procedures are in place to attract the best applicants to Barnet

SETTING A TIMELINE

From the time the advertisement is placed to interview is usually **a minimum of 5 weeks**. See information below to help you with your timeline. **Your Learning Network Inspector can advise** on a suitable timeframe.

Useful Dates:

HEADTEACHER RESIGNATION DATES	
RESIGNATION DEADLINE	TO COMMENCE EMPLOYMENT
31 January	Summer Term
30 April	Autumn Term
30 September	Spring Term

DEPUTY HEADTEACHER / TEACHER RESIGNATION DATES	
RESIGNATION DEADLINE	TO COMMENCE EMPLOYMENT
28 February	Summer Term
31 May	Autumn Term
31 October	Spring Term

Note: Staff in schools which do not follow the national conditions (independent schools, some academies, free schools) may have different notice periods depending on individual contracts of employment.

Things to consider:

WHEN SETTING A DATE, PLEASE CONSULT YOUR LNI SO THEY ARE AVAILABLE TO SUPPORT YOU ON KEY DATES eg shortlisting and the recruitment day itself.

Being Prepared:

It is also a good idea for governing bodies to have some succession planning in place (and a risk assessment), so that if the unexpected occurs they can swing into action quickly.

DEFINING THE NEEDS OF THE SCHOOL

All Governors should consider the school's current self-evaluation and improvement plan, any recent inspection outcomes and the current/future context for the school.

Make sure the governing body has:

- a clear idea about the current and future needs of the school
- analysed the skills and experience already in the leadership team
- defined the skills and experience you are seeking in a new headteacher
- the basis of a job description and a person specification

Your LNI can support you with this if necessary.

Governors may gain professional support from a variety of sources:

- HR expertise: identify the source of HR support and identify any associated costs.

- Educational expertise: it is not appropriate to seek the outgoing HT's advice in designing the recruitment processes. However, prospective candidates may wish to meet the outgoing headteacher during the 'informal' visit (see later).
- Administrative expertise: ensure that there is appropriate confidential administrative support.
The admin involved is significant.
- External recruitment consultant: Please discuss this with your LNI.
- BPSI governance advisers are able to give more intense support to governors but this would need to come out of the school's BPSI hours entitlement.

RECRUITMENT – A TIME PLANNER

According to National Conditions of Service, headteachers ordinarily may only leave post at the end of a term and are required to give a minimum of three months' notice, four months in the Summer term.

Stage	Time needed	Proposed date
Headteacher resignation received		
Appointment panel identified (full governing body meeting)		
Job description, person specification and salary scale agreed		
Advertisement placed Check deadlines with your provider	Allow a minimum of 11 days prior to publication if going through your HR provider. Most schools now shorten this process by going directly to the publication and advertise online.	
Applicant pack compiled		
Advertisement appears	Usually allow at least 14 days to the closing date	
Informal visit	Allow time for the candidate to use this information in preparing his/her application Decide who is best placed to lead a 'tour' of the school	
Closing date		
Shortlisting undertaken Interview arrangements confirmed Invitations to interview sent out	As soon as possible, ideally allow between 7 and 14 days to the interview date	
References requested	As soon as possible after shortlisting with a deadline for return which allows checking prior to interview	
Interview Appointment agreed		
Reconsider references		
Ratification of decision by full governing body	Directly following the interviews	
Job offer made subject to pre-employment checks	Immediately after ratification	
Other candidates notified of decision	Immediately the chosen candidate has accepted	
LA informed of appointment	Immediately verbal acceptance is received	
HR provider carries out pre-employment checks and issues contract to new HT	When notification is received and in time for candidate to meet resignation deadlines	

APPOINTMENT OF A SELECTION PANEL

The selection panel for the appointment of a head or deputy headteacher must be appointed by the whole governing body. **The quorum for this meeting is half the governing body membership, rounded up and not including vacant posts.** This meeting can be virtual or in person.

It is the panel that interviews suitable candidates and recommends one of the people interviewed to the full governing body for final ratification.

Criteria for selection may include:

- Experience of headteacher recruitment
- Experience of recruitment and selection in another field
- Gender balance and a cross section of governors
- A full understanding of the needs of the school and issues of discrimination and fairness

Please consider the following:

- The outgoing Headteacher should have no role in the decision-making of the appointment of their successor. A Headteacher may not vote on any matter relating to the selection of a new appointee
- If the discussion could result in the creation of a vacant post for which a governor who is an employee of the school may be a candidate, then that person may not vote
- The selection panel should consist of an odd number as the chair has no casting vote
- Our advice is a panel of 3-7 members, with 5 as an optimum number
- Members of the selection panel must be able to attend **all** meetings and interviews throughout the recruitment process
- The governing body is advised to nominate a reserve to act in case of sudden illness or emergency. A reserve would participate in all preliminary activities as appropriate
- The selection panel has no power to make changes to its membership in mid-process without the approval of the full governing body

Please note that **any advisor (including the LNI)**, do not have voting rights at any stage of the appointment process.

SETTING THE SALARY RANGE

The starting salary will depend on:

- The size of the school and its individual characteristics
- How governors define the scope of the advertised role within this: there is scope for increasing the salary if the role is over and above the usual role of headteacher (see School Teachers' Pay and Conditions Document)
- What the school can afford and ensuring any starting pay is sustainable over time
- Academies are not subject to the STPCD (although many use it), but it is still important that an appropriate salary is set for the post.

Please consider what you will do if the successful candidate asks for more during negotiations.

Governors need to ensure that decisions relating to award of a higher salary or additional payments are made in line with the school's individual pay policy. Governors are no longer able to make Recruitment or Retention payments to Heads, Deputies or Assistant Heads other than as reimbursement of reasonably incurred housing or relocation costs.

1 Determine the school's headteacher group.

Using the numbers of pupils as shown on the most recent DfE School Census the total units should be calculated using the following formula:

Key stage	Units per pupil
Foundation (full time equivalent), KS1 or 2	7
KS3	9
KS4	11
KS5	13
Special	+3

2 Identify the pay range for the headteacher group

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

A headteacher must not be paid less than the minimum point of the normal range for the school. If, after appointment the school's group size rises, then the Headteacher must be paid at least the minimum for the new school group.

3 Set the individual pay range for the headteacher position

Headteachers' recommended pay from 1 September 2023				
	England excluding the London area	Fringe area	Outer London area	Inner London area
1	£53,380 - £71,019	£54,685 - £72,311	£57,124 - £74,730	£62,304 - £79,856
2	£56,082 - £76,430	£57,383 - £77,730	£59,826 - £80,142	£65,007 - £85,267
3	£60,488 - £82,258	£61,789 - £83,554	£64,229 - £85,965	£69,407 - £91,095
4	£65,010 - £88,530	£66,316 - £89,818	£68,749 - £92,234	£73,933 - £97,359
5	£71,729 - £97,639	£73,034 - £98,935	£75,478 - £101,350	£80,655 - £106,476
6	£77,195 - £107,700	£78,507 - £108,995	£80,944 - £111,406	£86,119 - £116,535
7	£83,081 - £118,732	£84,391 - £120,021	£86,826 - £122,437	£92,007 - £127,564
8	£91,633 - £131,056	£92,933 - £132,352	£95,377 - £134,765	£100,552 - £139,891

(Source: TES)

This should be set within the range for the group as shown above in point 2. Governors may determine whatever range they deem appropriate for the post, which may, or may not include fixed scale points of their determination.

The pay range of a headteacher should not normally exceed the maximum of the headteacher group. However, where circumstances warrant a higher payment, Governing Bodies can decide to set their headteacher's pay range up to 25% above the maximum of the appropriate headteacher group range. **Only in exceptional circumstances, where independent advice has been sought and supported by a business case, can Governors exceed the 25% limit.**

Important Communications for Governors to Consider:

Here are some handy hints for governors to consider:

- It is not appropriate for staff, or even all governors, to know about the potential applicants. This needs to be explained to the school community.
- Consideration and sensitivity will be needed if there are internal candidates
- Governors need to communicate 'headline' details to the school eg the timeline,
- It is important that one of the recruitment panel acts as key point of contact/liaison with the staff.
- It is advised that governors appoint one internal member of staff to support them with organisation of the interview day (usually a member of the SLT/senior admin officer)

Note on the outgoing headteacher:

- Sometimes it can be hard for headteachers to stand back at this time
- This may be a particular issue if there is an internal candidate

It would be good practice to hold a frank discussion with the headteacher about the role he/she is expected to play and to keep them informed of the process.

Note on staff involvement:

The staff will be very interested in who will be their new headteacher. Governors should:

- Ensure that staff are kept informed about the process and timescales
- Possibly involve staff in the following: candidates to observe a lesson or hold an assembly
- Whilst staff feedback can be important, it is important they know the decision is yours

Note on other members of the governing body:

- While the whole governing body will be involved in the initial stages of the process, **once they have delegated responsibility for selecting a candidate to the appointment panel their input will be limited and all governors should be very clear about this.**
- Make sure that the panel gives updates on **the process**
- It is not appropriate to give details to the other governors about which candidates have applied or any detail of shortlisting or performance.

ADVERTISING THE POST

No advertisement may be placed until the current headteacher has given formal notification in writing of his/her resignation or retirement.

In preparing advertisements:

The advertisement must include:

- job title and purpose
- salary range, work pattern and location
- main selection criteria based on person specification
- closing date and interview date
- reply instructions
- equal opportunities and safer recruitment statements

Decide where you are going to advertise, make the advertisement as attractive as possible and budget for this.

Examples of places to advertise:

- TES (online)
- Barnet Council
- School Job Network (London based and run by BELS employees)

Some points to consider are:

- Look at the current advertisements in different media and see why some attract you more than others.
- Identify what it is about your school that makes it unique and enables it to stand out from the rest
- Think carefully about using pictures or illustrations. Many people are put off if these are too contrived.

Important Reminder:

Any advertisement should carry the safer recruitment strap line “the school is committed to safeguarding and promoting the welfare of children, young people, and vulnerable adults and expects all staff and volunteers to share this commitment. The school operates stringent safer recruitment procedures”.

INFORMATION PACK FOR PROSPECTIVE CANDIDATES

This should be ready for publication when the advertisement is placed. This can be made available electronically.

In the pack should be:

- Application form
- Job description
- Person specification
- The deadline for application, where to return the form, arrangements for visits and the interview date
- A covering letter from the Chair of Governors
- The need for an enhanced Criminal Record check through the Disclosure Barring Service (DBS) and right to work checks

Further suggestions for the information pack:

You may also want to include the following:

- SEF
- SIP
- Summary of the financial position
- How you are addressing any Ofsted areas for improvement
- Information about the area that the school serves, the buildings and local facilities
- The number of pupils on roll and school organisation
- Information about the governing body
- Information on the school's curriculum offer and achievement information

The school's website will often be the first line of investigation by prospective candidates, so it is important that it gives a positive and up-to-date impression of the school.

JOB DESCRIPTION AND PERSON SPECIFICATION

The main elements which must be included in the **job description** for a headteacher are set out in two key documents:

The Person specification is where the experience, knowledge, skills, attributes and characteristics needed by the prospective head are identified and will be very specific to your school.

The criteria will form the basis of the shortlisting and selection process.

Consider:

- Decisions based on the person specification could be liable to challenge under employment legislation.
- Decide which criteria are essential and which are desirable.
- At which stage of the appointment process they will judge if candidates meet each requirement, and what evidence will be used (and make this clear on the PS)

A sample person specification and job description are included at the end of this toolkit. You may wish to use the latest version of the Headteachers' Standards as a guide (link in the introduction).

INFORMAL VISIT

Most candidates will want to visit the school and should be encouraged to do so. **This should not be used for purposes of selection.** The visit is to provide additional information for the candidate so they can consider whether they want to apply.

The governing body selection panel should decide who is to lead these tours so that each candidate has the same opportunity and access to unbiased information. You should **not** involve potential internal candidates in conducting the tours. Think about the best timings for these too. Candidates will want to see children.

SHORTLISTING

Only the selection panel and LA/diocesan advisers will see the applications and shortlist candidates. As soon as possible after the closing date for applications the panel should draw up a shortlist of candidates to be called for interview. The process for this is as follows:

1. Each member of the panel should use a shortlisting form on which the essential and desirable criteria identified on the person specification have been entered.

2. Each panel member should read all the applications and enter a score on the form indicating how well each criterion is met. No new criteria should be introduced at this stage.
3. The panel should then share their opinions and come to a decision about which candidates should be called for interview.
4. Where an applicant is not being called for interview, record the reasons on a sheet of paper, date and sign it and attach it to the application form. All decisions for every part of the process will need to be documented fully and must be kept for a period of 6 months. This is so the Governing body will need to demonstrate that it has acted reasonably if challenged.
5. Check right to work, qualifications and NPQH registration if appropriate.
6. Carefully scrutinise the application form to check for any gaps in employment history which can then be followed up at interview.

Only those applicants who, on paper, appear to be acceptable and credible candidates for the post should be called for interview. Under the Council's 'Interview Guarantee Scheme' all disabled applicants must be shortlisted if they meet all the essential shortlisting criteria.

Interviews may go ahead with a very small field, even with just one candidate.

Please Note:

- If there are no candidates who sufficiently meet the criteria of the person specification, then the panel will need to go back to re-advertisement
- Governors should re-evaluate their process to ensure that it is effective in attracting suitable applicants
- Candidates are free to reapply if they wish, and should neither be encouraged nor discouraged, however if they did not meet the requirements of the person specification in their initial application, they are unlikely to be considered suitable in a second attempt.

Unsuccessful candidates, at this stage, should be informed at the same time as the successful candidates. Feedback should be offered to candidates who have not been shortlisted. The feedback should be based on what aspects of the Selection Criteria they did not meet. If the school's Learning Network Inspector has been involved in the shortlisting process he/she can carry out the feedback on the governing body's behalf.

CALLING APPLICANTS TO INTERVIEW

If you are inviting applicants for interview, ideally contact them first by phone and then confirm by email, including:

- date and time (check that sufficient notice is provided - at least one week)
- how long the interview process will last
- any selection tests, presentations or pre-interview preparation required
- if there is a secondary 'short listing' process on the day – eg only candidates who meet the appropriate skills set will be taken through to interview
- location and where to report on arrival
- any documentation they should bring to the interview e.g. qualification certificates, proof of identity.
- a request that they confirm they will be attending
- a map of the school and mention parking or transport if applicable

REQUESTING REFERENCES

References should be requested immediately following shortlisting, **for all shortlisted candidates, including internal ones.** It is important that the reference request includes a deadline for return **prior to interview** in order to follow up any safeguarding issues or discrepancies during the interview.

A minimum of two professional references should be taken up, **one of which should be the present or most recent employer.** References should always be requested directly from the

Head of Establishment and employers should not rely on open references or testimonials. Governors who are on the panel should not act as referees for any candidates, though the Learning Network Inspector (who does not have decision making powers in the process) may provide a reference if listed by the candidate. If the panel considers that the referees identified by any candidate are not appropriate, they can request that the candidate identifies the contact details of additional referees. The panel should identify one panel member who will take responsibility for chasing references should they not be received to the deadline.

Reference requests should be specific about any particular information required. A copy of the person specification and job description should be included in all reference requests. As well as asking for the referee's comments about the candidate's suitability for the position, governors should consider a structured reference proforma which requires additional comment in pre-determined areas. **This is essential in relation to the candidate's disciplinary record.**

Some panels decide that references will be read only by the safeguarding trained governor and the advisor/s prior to the interview in order to identify any issues for further investigation. References will then be reviewed later by the full panel, after it has identified its preferred candidate.

CHOOSING SELECTION ACTIVITIES

Governors will want to consider carefully the range of selection activities needed to provide the evidence for the selection of the right candidate for the school. Activities chosen should not give any advantage to an internal candidate. The Learning Network Inspector will advise on selection methods and how best to incorporate them into the selection process.

Selection activities must reflect the person specification and can include any of the following in addition to the final interview (**this list is not exhaustive**):

- Observation of the candidates interacting with children in their own school, or in your school, taking assembly etc
- Joint lesson visit with the candidate to assess their ability to evaluate teaching and learning and their skills in providing developmental feedback
- Oral presentation - to assess knowledge and understanding of one or more of the key tasks and overall presentation skills
- 10 minute presentation on some key aspect of school improvement, often based on the quality of the curriculum
- A written task - to assess written communication skills, expertise, knowledge and relevance of thought. e.g. writing their first letter to parents as the new Headteacher
- Data analysis – to assess their understanding of a range of data and ability to prioritise and plan strategically from evidence
- Group exercises with other candidates or with the SLT
- Learning Walk with feedback either in a presentation or in written form about their evaluation
- Written finance exercise around budgeting and how to relieve pressure on a budget by making spending adjustments
- In-tray exercise - to assess how potential candidates would prioritise and respond to a range of typical school issues
- Personnel case study. Scenarios could include disabilities, misconduct, capability, ill-health or safety issues and how they might be dealt with
- Meeting with pupils

Please note the following:

- If you involve others in the selection activities (ie not panel members), remember to make the distinction between advisory and decision making. Only governors on the selection panel have a vote.
- Members of staff who are involved may be asked about each candidate's strengths against the specific selection criteria, rather than for a subjective opinion.
- It is often advisable to get different pupils to meet with different candidates so that the pupils do not form a view of a preferred candidate.

The Learning Network Inspector involved on the recruitment day is usually asked to be a part of the activities e.g. lesson visits, meeting with SLT, data analysis etc.

Visits to the Candidate's Own School:

Some governors have found visiting the candidates in their own schools between shortlisting and the interview day very useful. You may want them to lead an assembly in their own school. This can be followed by a tour of the school asking the candidate to point out impact of their leadership and management. Some points to consider if you decide to do this:

- You may only do this if you can carry the activity out for **all** shortlisted candidates
- If there is an internal candidate the same process must take place i.e. you ask the candidate to take you on a tour of your school
- You need to be considerate and sensitive to the fact that the staff at the school may be unaware that the candidate has applied for a position in your school
- It is advisable that the same governors carry out all the visits.
- The feedback about these visits to the rest of the Selection Panel can form part of the interview day

The Formal Interview

This focuses on questions designed to gain insight over essential parts of the person specification.

The same questions should be asked of all candidates, but these may be followed up in relation to the individual candidate's response. It is permissible to ask for clarification on any specific issues arising from the individual application forms. **Your Learning Network Inspector can provide a range of questions as a basis for discussion.**

Safeguarding Questions:

It is important to include some questions which explore a candidate's motivation for working with children, as well as their understanding of the importance of their role in leading safeguarding practice within school (we advise that you pick no more than 3):

- In your role as a xxxxxxxx how would you promote and safeguard the wellbeing of the children?
- Can you give me an example of when you felt a child was at risk and what did you do?
- What motivates you to work with children? What has influenced you?
- What adult behaviour would you be concerned about? What would you do?
- What is your attitude towards safeguarding and child protection and has this changed over time?
- Can you identify a time when you were made to feel you were not in control of a situation by another person and how did you respond? Would you react/do something differently now?
- What do you do in your spare time?

Here is a suggested format for planning questions:

Criterion on person specification	Suggested question	Notes on candidate's response.
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THE INTERVIEW DAY

It is very important that you liaise with the school's staff to organise the day. You and the staff will need to consider the following:

- The timetable for the day – enough for governors, candidates and staff
- Where activities will take place?
- Will cover be needed to release staff involved with the activities?
- Where will the candidates be based?
- Which members of staff will support activities such as meeting the children's panels?
- Furniture and technical requirements. Will the school provide PowerPoint facilities, flipchart etc for the candidates to use for their presentation? What type of chairs will be used in the interview room?
- Refreshments. Will candidates be offered coffee on arrival, lunch etc?
- Who will be responsible for ensuring the above are organised? Who will greet the candidates and administer any exercises?

The Interview:

- Make sure that the questions link to the selection criteria
- Plan how you reach your decision: most panels use a scoring system
- Your LNI will advise you on the questions/how to reach a decision
- Preparing questions. Ensure that these link directly to the selection criteria and think in advance about the nature of answers you are looking for.
- Plan how you will reach your decision. A scoring system may be operated but is not essential. It is recommended, as it helps in the decision-making process.
- Remember to mention to the candidate how they will be informed, who will give feedback if successful/unsuccessful.
- Remember to give them a chance to ask questions
- Remember to mention the terms and conditions 'as advertised' and remind them of the pre-employment checks?

Other considerations:

- How will you report back to the full governing body?
- Check contact details so the chair of the panel can speak to the candidate to make the informal offer?
- **If you haven't seen the right person – don't appoint**

EQUAL OPPORTUNITIES IN THE INTERVIEW

The selection process must be carried out in a fair and non-discriminatory manner and that all questions/ exercises relate to the key documents, particularly the person specification.

To avoid the possibility of discrimination (and in keeping with the Equalities Act) questions on the following areas must be avoided:

- marital status;
- occupation of spouse/partner;
- number of children or intentions in this respect;
- domestic arrangements;
- religion;
- sex, colour, race, age, nationality, ethnic or national origin;
- health or disability;
- sexual orientation.

Applicants who have been unsuccessful and have been asked questions in these areas could pursue an application to an employment tribunal on the grounds of sex, race or disability discrimination.

APPOINTMENT AND RATIFICATION

The candidate should not be notified until at least one reference has been checked and the decision ratified by the governing body.

The meeting to ratify the decision should take place as soon as possible after the interview. It is usual for a meeting of the full governing body to be scheduled for the evening of the interview day.

Ratification Meeting:

- The meeting must be properly convened and quorate (it can be a virtual meeting)
- The quorum for this meeting is one half of the governing body membership, rounded up.
- This is when the final decision is taken on the salary to be offered to the chosen candidate.
- The discussion in this meeting is confidential and should be taken as Part 2.
- The role of the full Governing body is to gain assurance that the process has been carried out appropriately and thoroughly and that the panel is confident in the recommendation for appointment.

If the governing body does not ratify the appointment, then the process must start again.

The appointment will be subject to:

- Reconsidering references to ensure that they are satisfactory
- Ratification of the decision by the full governing body
- Completion of a pre-employment medical questionnaire and enhanced Criminal Record check by the Disclosure Barring Service
- Right to work/identity checks
- Barred list check;
- A prohibition from teaching check;
- Not disqualified to work with children disclosure
This is only for staff that will be working in or managing early years (reception and under) or employed in childcare under the age of 8
- Completion of a pre-employment medical questionnaire;
- Documentary evidence of stated professional qualification(s) which must include evidence of Qualified Teacher Status;
- ⊖ Overseas criminal records check for anyone who has lived or worked outside the UK and provision of a letter of professional standing issued by the professional regulating authority in the country in which they worked.
- A section 128 direction, Prohibition from Management check
This check is only for persons taking part in a management position in an academy or free school

INFORMING CANDIDATES

Once the decision of the appointment panel has been ratified, the following process should happen:

- the chair of the panel should contact the successful candidate, offer the position (subject to clearances as above) and gain their verbal acceptance of the offer.
- The LA should be notified (via the school's LNI).
- The school's HR provider should be informed of the recommended candidate in order that checks can be undertaken and contracts prepared.
- The chair of the interview panel should contact unsuccessful candidates as soon as possible after the successful candidate has accepted the provisional offer.

FEEDBACK

It is important to offer feedback on the interview **to both successful and unsuccessful candidates.**

Successful candidates: developmental areas are identified through the recruitment process and should form part of their induction and professional development processes (including performance management).

Unsuccessful candidates: governors should remember that anything said could be used in an appeal. It is particularly important to offer developmental feedback to unsuccessful internal candidates. The governing body should identify who is the most suitable person, in some cases, the Learning Network Inspector.

INFORMING THE SCHOOL STAFF AND PARENTS

Keep information confidential until the decision has been ratified and a formal offer accepted by the candidate. We advise that the Chair of Governors meets staff to give them the news in person.

It will be important to liaise with the successful candidate as to when this becomes public as this will need to be managed in line with their own school community being informed.

Parents should be informed at an appropriate time by a letter from the governing body.

WELCOMING AND SUPPORTING YOUR NEW HEADTEACHER

Having appointed your new Headteacher, think carefully about how you will help them settle into their new post, and what induction you, school and LA colleagues can provide for them. Some ideas to consider are:

- A handover meeting ideally between the exiting and incoming headteacher. **The LA have produced a “Handover Checklist for a New Headteacher”**
- A welcome letter or card from the governing body, arriving on the first day of term
- A planned visit from the Chair of Governors within the first few days of term
- An induction programme which includes an informal meeting with the governors at an early stage, and if possible prior to the first formal meeting of the Governing Body.

Your LNI will provide you with the following:

- The ‘handover checklist for a new headteacher’
- A ‘welcome to Barnet’ or ‘welcome to headship’ pack which includes:
 - The range of support for new heads
 - Details of the networks
 - Details of the partnerships
 - Contact information for schools and the LA

The new headteacher (whether new to headship, or experienced and new to Barnet) will be allocated a suitable mentor. The mentor is provided with a checklist to help them establish a positive and supportive relationship.

Your LNI will be able to support you in working with your new headteacher in the future.

SAMPLE HEADTEACHER JOB DESCRIPTION

Please add school logo

Model Headteacher Job Description

Post Title: Headteacher

Salary: Leadership scale range please add you leadership group range

Responsible To: The Governing Board / Trust Board / adjust as appropriate

Main Purposes of the Job

To provide professional leadership for the school which secures its success and improvement, ensuring high quality education which inspires and motivates its pupils and improves standards of learning and achievement. To work with and through others to secure the commitment of the wider community to the school.

To carry out the duties set out in Part IX of the School Teachers' Pay and Conditions Document.

MAIN TASKS

School culture

Headteachers:

- establish and sustain the school's ethos and strategic direction in partnership with those responsible for governance and through consultation with the school community
- create a culture where pupils experience a positive and enriching school life
- uphold ambitious educational standards which prepare pupils from all backgrounds for their next phase of education and life
- promote positive and respectful relationships across the school community and a safe, orderly and inclusive environment
- ensure a culture of high staff professionalism
-

You may want to also add some additional aspects based on the context of your school: eg.

- be a highly visible presence around the school and model expectations of staff and pupils.
- work in collaboration with the senior leadership team to share professional values and knowledge and understanding, celebrate achievements and take responsibility as a team for outcomes.
- lead weekly assemblies to promote the school ethos and values.

2. Teaching

Headteachers:

- establish and sustain high-quality, expert teaching across all subjects and phases, built on an evidence-informed understanding of effective teaching and how pupils learn
- ensure teaching is underpinned by high levels of subject expertise and approaches which respect the distinct nature of subject disciplines or specialist domains
- ensure effective use is made of formative assessment

You may want to also add some additional aspects based on the context of your school: eg.

- ensure there is a clear understanding of what good and outstanding inclusive teaching looks like and monitor standards through observations and discussions.
- work with the SLT to monitor the impact of provision and intervention, making adaptations as needed to promote good progress for all pupils.

3. Curriculum and assessment

Headteachers:

- ensure a broad, structured and coherent curriculum entitlement which sets out the knowledge, skills and values that will be taught
- establish effective curricular leadership, developing subject leaders with high levels of relevant expertise with access to professional networks and communities
- ensure that all pupils are taught to read through the provision of evidence-informed approaches to reading, particularly the use of systematic synthetic phonics in schools that teach early reading
- ensure valid, reliable and proportionate approaches are used when assessing pupils' knowledge and understanding of the curriculum

You may want to also add some additional aspects based on the context of your school: eg.

- ensure school performance information, both statutory and in school information, is used to identify priorities for improvement.

4. Behaviour

Headteachers:

- establish and sustain high expectations of behaviour for all pupils, built upon relationships, rules and routines, which are understood clearly by all staff and pupils

- ensure high standards of pupil behaviour and courteous conduct in accordance with the school's behaviour policy
- implement consistent, fair and respectful approaches to managing behaviour
- ensure that adults within the school model and teach the behaviour of a good citizen

You may want to also add some additional aspects based on the context of your school: eg.

- work in partnership with parents to improve pupil behaviour
- to include information about behaviour in the termly Headteacher Report to Governors.

5. Additional and special educational needs and disabilities

Headteachers:

- ensure the school holds ambitious expectations for all pupils with additional and special educational needs and disabilities
- establish and sustain culture and practices that enable pupils to access the curriculum and learn effectively
- ensure the school works effectively in partnership with parents, carers and professionals, to identify the additional needs and special educational needs and disabilities of pupils, providing support and adaptation where appropriate
- ensure the school fulfils its statutory duties with regard to the SEND code of practice

You may want to also add some additional aspects relevant to your context.

6. Professional development

Headteachers:

- ensure staff have access to high-quality, sustained professional development opportunities, aligned to balance the priorities of whole-school improvement, team and individual needs
- prioritise the professional development of staff, ensuring effective planning, delivery and evaluation which is consistent with the approaches laid out in the standard for teachers' professional development
- ensure that professional development opportunities draw on expert provision from beyond the school, as well as within it, including nationally recognised career and professional frameworks and programmes to build capacity and support succession planning

You may want to also add some additional aspects relevant to your context.

7. Organisational management

Headteachers:

- ensure the protection and safety of pupils and staff through effective approaches to safeguarding, as part of the duty of care
- prioritise and allocate financial resources appropriately, ensuring efficiency, effectiveness and probity in the use of public funds

- ensure staff are deployed and managed well with due attention paid to workload
- establish and oversee systems, processes and policies that enable the school to operate effectively and efficiently
- ensure rigorous approaches to identifying, managing and mitigating risk

You may want to also add some additional aspects relevant to your context.

8. Continuous school improvement

Headteachers:

- make use of effective and proportional processes of evaluation to identify and analyse complex or persistent problems and barriers which limit school effectiveness, and identify priority areas for improvement
- develop appropriate evidence-informed strategies for improvement as part of well-targeted plans which are realistic, timely, appropriately sequenced and suited to the school's context
- ensure careful and effective implementation of improvement strategies, which lead to sustained school improvement over time

You may want to also add some additional aspects based on the context of your school: eg.

- work with Governors and the SLT to prepare the annual School Evaluation Form and set priorities for coming year in the School Development Plan.
- obtain external validation of the effectiveness of the school annually.

9. Working in partnership

Headteachers:

- forge constructive relationships beyond the school, working in partnership with parents, carers and the local community
- commit their school to work successfully with other schools and organisations in a climate of mutual challenge and support
- establish and maintain working relationships with fellow professionals and colleagues across other public services to improve educational outcomes for all pupils

You may want to also add some additional aspects based on the context of your school: eg.

- actively support the work of the PTA to work collaboratively on local projects.
- actively engage in local authority groups such as network meetings and partnerships.
- run termly parent forum meetings to share information and to gather current opinions.

10. Governance and accountability

Headteachers:

- understand and welcome the role of effective governance, upholding their obligation to give account and accept responsibility
- establish and sustain professional working relationship with those responsible for governance
- ensure that staff know and understand their professional responsibilities and are held to account
- ensure the school effectively and efficiently operates within the required regulatory frameworks and meets all statutory duties

You may want to also add some additional aspects based on the context of your school: eg.

- meet with the Chair of Governors and the Clerk to agreed agenda for Board meetings as required.
- keep in regular contact with the Chair of Governors
- prepare a report to Governors each term.
- ensure all statutory reports and documents are kept updated and published on the school website
- facilitate governor monitoring visits to school.

Appendix 2

Governors will need to be clear about the qualities, experience and attributes which their new Headteacher will need. These criteria are given as exemplification only. Governors will need to identify whether criteria are essential or desirable. Particular care will need to be given to the column which identifies how each criterion will be assessed, in order to ensure that each part of the process can reflect a judgement on the candidate's abilities to meet these specific criteria.

SAMPLE PRIMARY HEAD TEACHER PERSON SPECIFICATION

Headteacher Template Person Specification

Please note that this person specification is an example to support discussion about the type headteacher that is right for the school. It should be adapted to contain the unique qualities to suit your particular school.

Essential Criteria		When / how identified
Qualifications and Experience		Application Form / Certificates / Interview Process/Other
1.1	Graduate level qualification or equivalent and QTS	C
1.2	Safeguarding, child protection and safer recruitment training qualifications and experience	C/AF
1.3	Significant experience as a senior educational professional in a primary school (Headship / Deputy or Assistant Headship) with a demonstrable track record of impact in improving pupil outcomes across the attainment range	AF/I
1.4	Experience of work with external partners and other agencies	AF/I
Knowledge and Skills You must ...		
2.1	Be a strong and effective leader who ... <ul style="list-style-type: none"> ◆ Is able to develop collaborative culture of innovation and creativity where staff take risks, self-reflect and share ownership in developments ◆ Is willing to challenge educational orthodoxies through well-evidenced research in the best interests of achieving excellence ◆ Listens carefully to children and ensures pupil voice is at the centre of decision-making ◆ Is able to build and maintain strong, positive relationships throughout the community and prioritise wellbeing as key to a successful school ◆ Places inclusion and equal opportunities at the heart of planning and decision making ◆ Actively drives the strategic vision, direction and whole school development to achieve high standards of learning and outcomes for all children ◆ Ensures the school vision, values and ethos are realised in practice ◆ Use a range of school performance information to support school improvement and decision making ◆ Demonstrates experience of embedding structures, systems, processes that enable robust self-evaluation and effectiveness ◆ Can delegate and distribute leadership effectively ◆ Has wide knowledge of the current educational climate, policies and research 	AF/I/O

2.2	<p>Have in-depth knowledge of the Early Years and National Curriculum and be committed to ensuring they are delivered in an exciting and creative way:</p> <p><i>This section needs to be pertinent to the school but some examples are below:</i></p> <ul style="list-style-type: none"> ◆ Being able to design a thoughtfully sequence, contextualised curriculum that... ◆ Ensuring the curriculum is coherent, progressive and that assessment ensures a clear understanding of impact in terms of progress ◆ Understanding the wider curriculum beyond school and the importance of engaging children in global issues ◆ Understanding the importance of implementing whole school, agreed approaches and policies ◆ Involving children in decisions about curriculum content, design and delivery ◆ Designing an effective curriculum leadership framework 	AF/I
2.3	<p>Be able to inspire and lead learning and teaching practice development throughout the school by ...</p> <ul style="list-style-type: none"> ◆ Demonstrating understanding of the ways in which children learn best and which teaching approaches or classroom organisation techniques support these ◆ Recognising the best in educational research and using this as a basis to drive collaborative pedagogical development ◆ Understanding the key roles of high-quality feedback; metacognition and pupil agency within children's learning ◆ Understanding barriers to learning and how to overcome them (eg for disadvantaged pupils). ◆ Developing the staff's approach and understanding of assessment processes, so that there is shared knowledge of children's starting and end points 	AF/I/O

2.4	Have experience of monitoring the work of the school and using the outcomes to improve provision and standards through: <ul style="list-style-type: none"> ◆ Regular and rigorous monitoring of the quality of teaching and learning to inform leaders of its impact on pupil progress and staff development needs ◆ Analysing the impact of new practices, support and interventions 	AF/I
2.5	Know which strategies will ensure standards are maintained and improved by: <ul style="list-style-type: none"> ◆ Developing strong, mutually respectful relationships between all members of the community as central to a calm, orderly and purposeful atmosphere within the school and playgrounds ◆ Creating systems to regularly monitor pupil progress, attitudes to learning and well-being so positive trends are maintained and attainment gaps are targeted particularly for vulnerable groups 	AF/I/O
2.6	Be committed to providing a safe environment for pupils by: <ul style="list-style-type: none"> ◆ Ensuring the environment is cared-for, stimulating and well maintained ◆ Ensuring everyone is regularly trained to understand the importance of safeguarding and that a strong safeguarding culture permeates the school 	AF/I/O
2.7	Oversee the professional development and well-being of staff through: <ul style="list-style-type: none"> ◆ An ability to inspire, coach and empower staff by establishing and sustaining high quality training built on an evidence-informed understanding of professional development ◆ A commitment to developing clear structures to support and maintain positive staff well-being ◆ Establishing effective communication systems across the school ◆ Providing high quality induction and support to new staff including NQTs 	AF/I/O
2.8	Be committed to and have experience of communicating with and working in partnership with a variety of stakeholders, including: <ul style="list-style-type: none"> ◆ Children ◆ Parents/carers, including PCTA ◆ Governors ◆ LA/Cluster/partnership groups ◆ Feeder schools 	AF/I/O
2.9	Be able to manage the school efficiently and effectively, including HR, finance and accommodation with ... <ul style="list-style-type: none"> ◆ Knowledge of strategic financial planning, budgetary management and principles of best value ◆ An ability to take an innovative approach to generating additional income for the school 	AF/I/O
Personal Attributes We are looking for someone who ...		
3.1	Acts as a role model who is hands-on and highly visible, demonstrating personal impact and presence	AF/I
3.2	Operates with integrity, respect for others and authenticity	AF/I
3.3	Shows impressive organisational and interpersonal skills and a flexible management style	AF/I/O
3.4	Thinks creatively to anticipate and solve problems	AF/I
3.5	Communicates effectively, both orally and in writing, and can build relationships with a widerange of audiences	AF/I/O
3.6	Remains calm and resilient under pressure	AF/I
3.7	Brings a good sense of humour to the role	I
4. Desirable Criteria		When / how identified
4.1	An experienced primary headteacher	AF/I
4.2	Experience of working in a large school across the primary phase	AF/I
4.3	Breadth and depth of teaching and leadership experience in more than one school setting	AF/I
4.4	Experience of engaging in educational research to drive school improvement (school-based action research or use of research)	AF/I

APPENDIX 3
SHORTLISTING FORM

School..... Job Title..... Interview date.....

No	Name of applicant	Essential Criteria												Desirable Criteria				Total essential	Total desirable	To be interviewed
1																				
2																				
3																				
4																				
5																				
6																				
7																				
8																				
9																				
10																				

Shortlisting officers:
Date:

Grade each application form against the criteria. 3= fully met or exceeded, 2=met, 1=weak evidence, 0= no evidence