



Appointing Headteachers

London Diocesan Board Guidelines

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Introduction

The appointment of a new Headteacher is one of the most important responsibilities of a governing board. These guidelines are designed to support you through the process, and LDBS advisers will work with you at every stage so that you do not feel alone in recruiting and selecting the best candidate for your school.

The local authority (LA), other sponsoring bodies and/or the school's HR provider may also be a source of professional support through the process.

Other sources of information and advice include:

[Recruiting a Headteacher](#), joint guidance from DfE and the National Governance Association (NGA).

[Headteacher recruitment toolkit](#) from the NGA.

DfE [Staffing and Employment Advice for Schools](#).

Research shows that when staff feel part of a secure, empowered and well-supported team they create the best learning environments and opportunities for their pupils who in turn work harder and achieve more. It also shows that the Headteacher's leadership is the most important factor in creating this positive working culture.

The context for headteacher recruitment has changed over time. Retirement of the baby-boom generation and low geographical mobility (three-fifths of headship posts are filled within a local authority area) mean that the number of applicants has reduced over the years. There can be additional challenges for church schools, faith schools, separate infant and junior schools and schools with a current judgement of outstanding from Ofsted. Primary and special schools tend to have more difficulty recruiting than secondary schools. Governors need to understand the constrained circumstances in which they are now recruiting, whilst not compromising on the need to select a good candidate who will deliver the governing board's vision for the school and excellent outcomes for the pupils.

It is therefore even more important that you use a thorough and well-planned process, to give the best opportunity of getting the best headteacher for your school.

This guidance will also support you in appointing deputy headteachers and other members of the senior leadership team.

The Statutory framework

Appointments will be made under the 2002 Education Act section 35(8) and 36(8).

The DfE [Governance Handbook](#)

outlines the statutory framework for recruitment:

Governing bodies of maintained schools **must**:

- Notify the local authority (LA) of a headteacher or deputy headteacher vacancy
- Advertise the post unless there is a “good reason” not to do so
- Ensure the appointment panel includes at least three members of the governing board, one of whom must have undertaken safer recruitment training
- Take steps to ensure that the appointee meets the regulations regarding qualifications, health, fitness, safeguarding requirements and other grounds

In voluntary aided schools where the board is the employer and where it has been agreed that the LA has advisory rights, the board must consider any advice offered. Where a church school has given advisory rights to the LA, diocesan advisers automatically have the same rights, LDBS recommends that schools do give LAs advisory rights.

In voluntary controlled schools where the LA is the employer, a representative of the authority may attend proceedings relating to the selection or dismissal of any teacher. The governing board must consider any advice offered by the representative. The LDBS adviser should also be invited.

For voluntary aided schools which have not accorded advisory rights to the LA for the appointment of head and deputy headteachers the 2002 Education Act requires that:

- A list of shortlisted candidates is sent to the LA
- As much information as possible is provided to the LA on each person selected for interview, to enable the LA to determine their suitability for appointment
- Any representations the LA may make regarding shortlisted candidates are considered within 14 days and the LA is notified in writing of the governing board’s response to those representations
- The final decision on who to recommend for appointment is taken
- Steps are taken to ensure that the appointee meets the regulations regarding qualifications, health, fitness, safeguarding requirements and other grounds

The governing board must appoint an Acting HT if the outgoing head leaves before a replacement is in post and must recruit a new headteacher as soon as is practically possible.

The requirements for academy trusts are set out in their funding agreements and the articles of association.

Equal opportunities

The LDBS is committed to anti-racism and to promoting equality and diversity. It expects that the recruitment process is professional and consistent, adheres to equality and diversity policies and law, employment law and the principle of recruitment of staff on the basis of merit.

The governing board must ensure that it fulfils its responsibilities under the Equalities Act 2010. Schools must not discriminate directly or indirectly against any prospective employee on the basis of any protected characteristic in relation to appointments or pay and conditions.

Unconscious bias can affect recruitment processes and so unconscious bias training for members of the selection panel is recommended as good practice. More information can be found in section 3.2 of the [DfE/NGA Recruiting a Headteacher](#) guidance and on the [ACAS website](#).

'Name blind recruitment' is also recommended to help increase social mobility and diversity in the workplace. Equality monitoring sections of application forms must always be removed before they are shared with members of the selection panel.

Voluntary aided schools have additional scope to take into account certain religious or denominational considerations in making specified employment decisions relating to their staff. Further advice can be found in section 6 of the [DfE guidance](#).

Leadership options for the future

It is essential that you determine arrangements for the leadership of the school which will secure its future success.

The resignation or retirement of the school's serving headteacher can present the governing board with a good opportunity to review leadership arrangements. You may want to consider new models of headship for example co-headship or executive headship, alongside different models of school organisation such as federation or joining a multi-academy trust (MAT).

LDBS advisers can offer information and advice on options for school leadership and organisation.

Preparation

When the governing board receives the resignation of the headteacher and makes the decision to go ahead with a recruitment process there is much to do and timescales can be tight. It is important that you take time to really understand the process and the context for recruitment to this post. This can avoid pitfalls later.

Things to consider

Timing of the vacancy and recruitment process

Notice periods for potential candidates and the pattern of the school year can affect the size and quality of the field you get. The busiest time for advertising headteacher posts is between January and March and secondary schools advertising in January and February get higher application fields than at any other time of year. A recruitment process in the summer term and particularly from June onwards is unlikely to result in an appointment for the start of the school year in September and so you are more likely to need a temporary acting head in place for the start of the new school year.

See Appendix 1 for notice periods.

Sensitive dialogue with your existing head can help you to get maximum notice of a headteacher vacancy. The best prepared governing bodies will have an outline recruitment process planned so that if the unexpected occurs they can swing into action quickly.

Managing impact on the school community

The resignation of a headteacher can be unsettling as it marks change to the status quo. Effective communication with different stakeholders is key.

It is important for governors to agree and articulate their future vision for the school. This may be a new experience for some and any areas of conflict should be carefully resolved.

The recruitment process must be carried out in a confidential and sensitive way. It is not appropriate for staff to know all the details of the process or about potential candidates. However you should communicate 'headline' details to the staff including the timeline to reassure of your commitment to appointing the best possible head. Students and parents need similar messages. Make sure you consider potential internal candidates within the process and consider early on how any other staff will be involved. A practical suggestion is for one of the recruitment panel to be the key point of contact/liaison with the staff.

How long the process might take

It can be much longer than you expect to get from the point of the vacancy arising to having a new headteacher in post. From advertisement to interview is likely to be a minimum of 4 weeks. Your successful candidates will need to serve notice, specific deadline dates shown in Appendix 1. Your LDBS adviser can give guidance on a suitable timeframe using the process planner at Appendix 2.

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, but they are unlikely to be shorter.

The number of applicants

The current national picture for headteacher recruitment means that you might not get many applicants; this is not necessarily a reflection on your school or the recruitment materials. Your panel should make its decisions to interview on the quality of the applicants and should not be reluctant to interview a low number of candidates.

It is important to realise that you may not necessarily appoint after the first round of recruitment and you should stay optimistic.

Recruitment Consultants/headhunters

A governing board might consider buying in a consultant/recruitment agency to steer the process. This can be costly and will not necessarily result in an appointment. If you do decide to go ahead with this option, then you must establish clear roles and responsibilities must be established between the governing board, your LDBS link adviser, any LA advisers and the consultant.

The outgoing headteacher

The outgoing headteacher is precluded from any decision making in recruiting and appointing his/her successor by legislation (The Education (School Government) (England) (Amendment) Regulation 2000). You should be aware of the sensitivities here and you are encouraged to have an open discussion with the headteacher about the role he/she is expected to play and to keep them informed of the process.

The process step by step

All decision about every stage of the process should be documented and must be kept for a minimum of six months. The Governing board will need to demonstrate that it has acted reasonably if challenged.

An outline grid for planning the process timeline is in Appendix 2.

Defining the needs of the school

The full governing board should be involved in this step of the process; it is the basis for a successful appointment.

You should consider the school's vision, its current self-evaluation and improvement or development plan, any recent inspection outcomes and any other relevant contextual issues.

The outcomes of the stage should be:

- A clear picture of the current and future needs of the school
- Clarity on the skills and experience already in the leadership team
- An outline of the skills and experience you are seeking in a new headteacher which will be the starting point for the job description and person specification

Choosing a selection panel

This must be done by the governing board, usually at a formal meeting, often the same meeting as the definition of need (above).

The governing board must select a panel of at least three governors who will conduct the recruitment and selection process in full. This panel will shortlist and interview suitable applicants and recommend a chosen candidate to the full governing board for final ratification.

The panel should maintain appropriate confidentiality throughout the process. Meetings must be properly convened and quorate.

Criteria for inclusion on the panel may include:

- Experience of headteacher recruitment
- Experience of recruitment and selection in another field
- Ensuring a cross section of governors: consider diversity and the balance of foundation and other types of governor

Other options to consider:

- An odd number of panel members as the Chair has no casting vote. We recommend up to 7 members, with 5 as the ideal number

- Panel members must be able to attend all meetings and interviews throughout the process
- You may want to nominate a reserve to act in case of sudden illness or emergency. She /he would participate in all preliminary activities as appropriate
- The panel can only make changes to its membership mid-process with the approval of the full governing board
- An outgoing headteacher should have no role in the decision about the appointment of their successor and may not vote on any matter relating to the selection of a new appointee. You may find his/her support valuable in organisation of the process
- Although staff governors are allowed to be panel members you should consider the implications of this choice very carefully
- If the appointment could result in the creation of a vacant post for which any panel member who is an employee of the school may be a candidate then that person may not vote
- A staff governor would be regarded as having had an interest if he/she were to participate in a selection panel whose decision to appoint an internal candidate created a post for which that teacher then applied
- Make sure that it is clear to governors who are not part of the selection panel that they will be kept informed of the progress of the process but not the details of applicants and their performance

Determining the salary range

Arrangement for headteachers' pay in maintained schools are set out in the current

[School Teachers' Pay and Conditions Document \(STPCD\)](#)

It explains how to calculate the school group according to the number of pupils in each key stage and how to assign a pay range.

You should consider the following in making your decision:

- Local benchmarking data
- A minimum salary which is high enough to be attractive
- A maximum salary which is not so high that it will burden the school with a financial commitment it cannot meet in the future
- Whether there are circumstances which warrant offering a salary outside the normal range for the school's group

You should also give some thought to what line you will take if your successful candidate asks for a higher salary when offered the post. Any decisions about the award of a higher salary or additional payments must be made in accordance with the school's pay policy. Note that recruitment and retention payments cannot be made to Headteachers, Deputy Headteachers or Assistant Headteachers (other than as reimbursement for reasonable relocation costs).

Your LDBS link adviser and/or HR team can provide additional guidance.

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.

Administrative and logical support

It is a good idea to identify a suitable member of the school's support staff to provide administrative support for the process and be the panel's point of contact in school. This person or another suitably knowledgeable contact will need to advise on logistics for visits and the interview day(s).

Advertising the post

The governing board may not place an advert until the current headteacher has given formal notification in writing of his/her resignation or retirement.

A national advert is usually required, governing bodies are free to determine how this is done.

Advertising can be costly, so make sure that you know what the charges will be, set a budget and make the most of any advertising subscriptions which the school has in place, for example Guardian advertising through LDBS.

Most advertisements now appear online and are increasingly shared via social media. The TES remains a widely used service, all LDBS core-subscribing schools can place adverts free of charge on the LDBS website.

Effective advertisements can be powerful in attracting good candidates. It must be well-presented and strike a balance between selling the school and making out that it is perfect with no room for a new headteacher to make a difference. You should look at advertisements for other schools to help in your design, consider what makes your post unique and will make it stand out from others.

Your advertisement must include:

- name of the school and contact details
- job title and purpose
- salary range, work pattern and location
- key selection criteria based on person specification
- closing date and interview date
- reply instructions
- equal opportunities and safer recruitment statements

Information for prospective candidates

The pack

The pack should be ready when the advertisement is placed. It is often the first direct communication which potential candidates have with the school. You should make sure that the nature, tone and quality of presentation convey your desired impression of the school; try to strike a balance between realism and promotion.

The pack is usually made available electronically, and applications made on line or emailed; applicants should sign their application on the day of the interview.

What to include:

- Covering letter from the Chair of Governors welcoming interest in the post and inviting prospective candidates to visit. This letter could include a brief summary of the reason for the vacancy
- Job description
- Person specification
- Application form
- The deadline for application, where to return the form, arrangements for visits and the interview date
- A school prospectus and/or a link to the school's website
- A map of the environs of the school
- 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 board
- A brief statement of the financial position of the school
- A brief evaluation of the school's current challenges and key development priorities, including any remaining issues from the last inspection report
- Reinforcement of the school's commitment to protecting children through the school's standard safer recruitment statement used in all recruitment packs, including the need for an enhanced Criminal Record check through the Disclosure Barring Service (DBS) and right to work checks

You will need to decide how packs are made available: on line, via the school or through an HR provider. Remember that contact with the school should be friendly and encouraging for **all** prospective candidates. You may have greater control of the content and tone of interactions if there is a suitable named person in the school admin team.

Your LDBS link adviser can provide examples to guide you.

Websites

The school website is likely to be first port of call for potential candidates. Make sure it is up to date and positive.

Next step will be OFSTED for the school's most recent report, and the DfE Performance Tables for exam/test results data (and the previous year's workforce and financial information).

Job Description and Person Specification

Your LDBS link adviser can provide examples of jobs description and person specifications as guidance and starting points.

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

[School Teachers' Pay and Conditions Document \(STPCD\)](#)

[Headteachers' standards 2020](#)

The job description will be similar for all headteachers. You can start with an example and customise it to fit the distinctive nature and requirements of your school. For LDBS schools it should include maintaining and developing the Christian character of the school.

The Person specification sets out the experience, knowledge, skills, attributes and characteristics needed by the new headteacher and will be specific to your school.

The criteria should relate to the job description and be objective and measurable as they will be the basis of shortlisting and selection. You should take care to avoid linking future needs to the qualities and skills of the outgoing headteacher. Also be aware that decisions based on the person specification could be liable to challenge under employment legislation.

Criteria are often categorised as essential or desirable. You must also consider which stage of the appointment process you will use to judge whether or not candidates meet each criteria, and what evidence you will use.

Some governing bodies choose to ask staff and pupil for their ideas about what they feel is important for their new headteacher to bring so that some or all of this can be reflected in the person specification criteria as appraise.

Christian commitment

For Church of England schools the criteria relating to the Christian character of the school often generate the most discussion in planning. Clearly it is essential that your new headteacher is willing and able to uphold and develop the school's Christian character. There is no requirement for the headteacher to be a practising Christian, Anglican or of another denomination. Many LDBS schools choose to include this as a desirable criterion.

National Professional Qualification for Headship (NPQH)

It is no longer a requirement that a first time headteacher has completed NPQH. Many governing bodies continue to list NPQH as a criterion on the person specification, others choose a broader description of suitable training in preparation for headship.

Visits before application

Visits give candidates the opportunity to gather additional information to help them decide whether to apply and to make their application. They should not be used for selection purposes.

You should consider the most appropriate person to host these visits and lead tours so that each candidate has the same opportunity and access to unbiased information. The outgoing headteacher may be the best person, although their involvement is not automatic. Take care not to involve potential internal candidates. Make sure that the visits are well managed and co-ordinated with the school's calendar and activities.

Shortlisting

The selection panel and diocesan advisers are the only people who will see the application and shortlist candidates (also LA advisers in maintained schools). It is good practice to shortlist those candidates to be called for interview as soon as possible after the closing date for applications.

The shortlisting process:

- Use a shortlisting form containing the essential and desirable criteria identified on the person specification. No new criteria should be introduced
- Individually panel members read each application and complete a form for that applicant to indicate whether each criterion is met (this can be done in advance or in the shortlisting meeting)
- Panel members then share their views and come to a decision about which candidates to call for interview
- If an applicant is not shortlisted then the reasons should be recorded, dated, signed and attached to the application form
- Check right to work and qualifications
- Each application must be checked closely for any gaps in employment history which can then be followed up at interview

Only those applicants who appear to be credible candidates for the post should be called for interview. Your final shortlist should be based on the quality of applications, not quantity. Interviews may go ahead with a very small field, even with just one candidate.

If there are no candidates who meet the criteria of the person specification well enough then the governing board may decide to re-advertise. In this case you should re-evaluate your process and make any changes which may make it more effective in attracting suitable applicants. Candidates are free to reapply if they wish and you should neither encourage nor discourage.

Some local authorities operate 'Interview Guarantee Schemes' under which all disabled applicants must be shortlisted if they meet all the essential shortlisting criteria.

Successful and unsuccessful candidates should be informed at the same time. Candidates who have not been shortlisted should be offered feedback on which aspects of the selection criteria they did not meet (if there is a very large number of applicants then this may not be practical). Your LDBS link adviser may be able to give the feedback on behalf of the panel.

Calling candidates to interview

You may decide to make initial telephone invitations to interview, followed by the information in writing (email is usual) including:

Dates and times

Whether the field will be further reduced after the first stage of the process

Details of any pre-interview preparation required

Location and where to report on arrival

Any documentation they should bring to the interview eg qualification certificates, proof of identity

A request for confirmation that they will be attending

Arranges for parking and details of public transport access to the school

References

References should be requested immediately following shortlisting for all shortlisted candidates including any internal. The request should include a deadline for return which will allow time to check the references carefully **prior to interview**; any safeguarding issues or discrepancies must be followed up during the interview.

A minimum of two professional references should be taken up, one of which should be the present or most recent employer. Requests should always be made directly to the head or leader of the organisation. You should not accept open references or testimonials. Governors who are on the panel should not act as referees for any candidates. Advisers, LDBS or LA may provide a reference if listed by the candidate. If you consider that the referees identified by a candidate are not appropriate then you can request that she/he identifies additional referees. References must be chased if they are not received by the deadline.

Reference request should be specific about any particular information required and include a copy of the person specification and job description. Many schools use a standard structured reference proforma for all posts which includes the essential information about the candidate's disciplinary record and suitable to work with children.

It is important that the panel's decision on the day is informed by references but not predetermined or coloured by the opinions of referees. You may decide that references will be read only by the safer recruitment trained governor and the advisers prior to the interview. References will then be considered later by the full panel once it has a preferred candidate.

Choosing selection activities

Your LDBS link adviser will support you in choosing a suitable range of activities and working out a schedule for the interview day(s), which usually culminates in a final interview with the full panel.

Selection activities must reflect the person specification and should not give any advantage to an internal candidate.

Possible activities include:

- Leading collective worship
- Lesson observation and giving feedback to the teacher
- Learning walk with written feedback or a presentation about findings
- Interaction with pupils in a classroom setting, over lunch or in a small group
- Interview by a pupil panel
- Interview by a staff panel
- Finance/budget task with written and/or oral feedback
- Pupil data task with written and/or oral feedback
- Interview(s) with a sub-set of the selection panel (often a leadership and management focus)
- Prioritisation/ delegation task (in-tray exercise)
- Written communication task
- Leading an SLT meeting
- Lunch with staff
- Aptitude tests or a personality questionnaire
- Teaching (less common for headteacher interviews)

The final activity is almost always a formal interview, often following on from a presentation. You should design questions to gain insight in the essential parts of the person specification and to probe any areas from the earlier activities.

You may decide to involve governors not on the panel in some of the activities but remember that only panel members have a vote. You should ask others involved for each candidate's strength against that specific selection criteria to be judged in that activity, and any areas they suggest the panel should probe in the final interview rather than for their opinion about who should be appointed.

It is a good idea to involve your LDBS link adviser and any other professionals in activities with which the panel will need most advice on whether the candidates are meeting the required selection criteria, usually teaching and learning and pupil data analysis.

Some panel have found it useful to visit the candidates in their own schools between shortlisting and the interview day. You may combine this with one of the activities that is going to be used as part of the selection process eg leading collective worship or teaching. You could also ask the candidate to give you a tour of the school pointing out impact of their leadership and management. You can only make these visits if it is possible for all shortlisted candidates and you must do the same for any internal candidates. Be sensitive to what staff do or do not know about candidates applying to

your school. The same governors should carry out all the visits and at least one constant governor must attend all of them.

The interview day(s)

Planning

It is important that you take time to plan the interview day carefully to ensure that it runs smoothly. Your LDBS link adviser can help and you should work with the nominated member of staff in school as they will be able to advise on what is logistically possible. The outgoing headteacher is not usually involved on the interview day(s).

Consider:

- Timetable and a suitable venue for each activity
- A base for the candidates
- A base for the panel
- Technical requirements
- Furniture in the venues
- Refreshments for candidates and the panel
- Information to staff, pupils and parents
- School staff to support activities eg jointly observe lessons, access data analysis or financial tasks
- Greeting candidates and explaining the day
- Candidates moving between activities
- Checking requested documents
- Preparing questions
- How you will reach your decision
- How you will report back to the full governing board
- Who will contact the candidates to make the informal offer.
- How the formal offer will be made
- Who will contact the unsuccessful candidates

Interview questions

The person specification details what you are looking for in your new headteacher and so should be the basis for your questioning. It is best practice to frame questions around previous experience rather than hypothetical situations. The same questions should be asked of all candidates but you can follow up on individual responses. You are also able to ask for clarification on any issues arising from their application form.

Your LDBS link adviser can provide a bank of questions to guide you.

Reaching your decision

It is useful for the panel to collate feedback from all the different activities. If it is a 2- day process then you should use feedback at the end of day 1 to determine which candidates will progress to the second day. It is not essential to use a scoring system but it can be helpful in the making the decision and feeding back to unsuccessful candidates. Your LDBS link adviser will support you to gather the information in an objective manner.

Equal opportunities in the interview

Clearly the selection process must be done in a fair and non-discriminatory way. You must make sure that it is the same for all candidates and that questions/ activities relate to the key documents, particularly the person specification. The panel must not discriminate on the grounds of any of the protected characteristics of age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation

To avoid the possibility of discrimination you must not ask questions on the following areas:

- 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

Appointment and ratification

The full governing board must meet to ratify the selection panel's decision (maintained schools, academy arrangements are contained in articles and funding agreements). This meeting should take place as soon as possible after the interview and it is usual for it to be scheduled for the evening of the final interview day. The meeting must be properly convened and quorate; discussion in this meeting is confidential and should be taken as Part 2. The final decision on the salary to be offered to the chosen candidate is also made at this meeting. The panel presents their recommendation to the governing board the full governing board needs to be assured that the process has been carried out appropriately and thoroughly and that panel is confident in its recommendation. Those governors not on the panel will not be required to have an opinion about the suitability of the candidate. If the governing board 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
- An enhanced criminal record check by the Disclosure and Barring Service (DBS)
- Right to work/identity checks
- Barred list check
- Prohibition from teaching check;
- Disqualification by association (for staff that will be working in or managing early years reception or 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 checks for any sanction/restriction that may have been issued by an EEA professional regulating authority.
- A section 128 direction, Prohibition from Management check (for those taking a management position in an academy or free school)

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

Informing candidates

As soon as the appointment panel's decision has been ratified, you should contact the successful candidate, offer the position subject to clearances as above and gain their verbal acceptance of the offer. It is usually the Chair of the selection panel who makes this call.

The school's usual processes for pre-employment checks and preparation of contracts should be followed. Contracts should be issued swiftly to enable the candidate to tender his or her resignation; verbal acceptances are binding in law but they are difficult to enforce. The LA should be notified.

The Chair of the selection panel should contact unsuccessful candidates as soon as possible after the successful candidate has accepted the provisional offer.

Feedback

Feedback should be offered to both successful and unsuccessful candidates. You should identify who is the most suitable person to do this and make their contact details available, likely to be the LDBS link adviser.

Development areas identified through the recruitment process should be part of the induction, professional development or performance management plan for your successful candidate. For unsuccessful candidates remember that anything said could be used in an appeal. It is particularly important to offer development feedback to unsuccessful internal candidates.

Informing the school community

The school community will be very anxious to know who has been appointed as its leader, however it is advisable to keep this confidential until the decision has been ratified and a formal offer accepted by the candidate. Members of staff appreciate the Chair of governors meeting with them to share the news in person. You should liaise with the successful candidate as to when the appointment becomes public so it is managed in line with when their own school community is told.

You should inform parents at an appropriate time by a brief letter from the governing board, giving the name and recent details of the new headteacher and a short statement of welcome. In these days of instant news it will be wise to put this letter or a similar statement on the school website.

Pupils should also be informed, either in class groups or during an assembly.

Welcome and support

Once the appointment process is complete you must consider how you will support your new headteacher to settle into the post and be successful.

Your LDBS link adviser can advise but these suggestions could form part of an induction and ongoing professional development plan:

- Handover meetings between the existing and incoming headteacher. Using a handover checklist ensures that these are fruitful and focused discussions
- A planned meeting with the Chair of Governors before the term starts
- A welcome letter or card from the governing board, arriving on the first day of term
- A planned visit from the Chair of Governors within the first few days of term
- LDBS new headteacher induction session
- Formal paid mentoring by an experienced headteacher
- Professional coaching
- Introductions to networks and stakeholders by appropriate governors and/or school staff

- Participation in a training programme for new headteachers
- A local headteacher “buddy”

This list is not exhaustive and you should be attentive to the headteacher’s own evaluation of their professional development needs which will in turn benefit school improvement.

A new headteacher inevitably means a new relationship and is an opportunity to evaluate and refresh ways of working. You should discuss expectations from both sides, including for performance management, in order to establish a positive relationship which takes the school forward effectively.

Appendix 1

Latest dates for headteachers (and deputy headteachers) to give notice.

To leave at end of:	Headteacher	Deputy Headteacher
Autumn term	30 September	31 October
Spring term	31 January	28 (29) February
Summer term	30 April	31 May

Appendix 2

What	Who	Time needed	Notes	Proposed date
Headteacher resignation received				
Inform LDBS link adviser (and LA)	Chair of Governors			
Define the needs of the school	Governing board		These can all be done in the same meeting	
Agree salary scale	Governing board			
Appointment panel identified	Full governing board at a meeting			
Agree dates for the process	Appointment panel chair with advisers and panel members		Do this as early as possible	
Identify in-school administrative support	Appointment panel chair			
Application pack compiled and agreed: school information, job description, person specification, salary scale and advertising arrangements	Appointment panel			
Advertisement placed and appears		Check deadlines with your advertisers. Usually allow at least 14 days to the closing date		
Informal visits for potential candidates		Allow time for the candidate to use this information in preparing his/her application	Consider role of current headteacher in these visits	
Closing date				

Shortlisting	Appointment panel			
Interview arrangement confirmed	Appointment panel			
Invitations to interview sent out	Admin	As soon as possible	Full details can be sent nearer to the interview	
References requested	Appointment panel	As soon as possible after shortlisting with a deadline for return which allows checking prior to interview		
Interview	Appointment panel		School staff and students likely to be involved	
Appointment agreed to recommend to governing board	Appointment panel	End of interview process	NB Academy requirements laid out in funding agreements	
Reconsider references	Appointment panel			
Ratification of decision by full governing board	Governing board	Directly following the interviews		
Job offer made verbally and subject to pre-employment checks	Chair of governors	Immediately after ratification		
Other candidates notified of decision and given arrangements to receive feedback	Chair of governors	Immediately the chosen candidate has accepted	Another panel member or adviser sometimes does this	
LA informed of appointment		Immediately verbal acceptance is received		
Pre-employment checks carried out and contract issued to new HT	School or HR provider	When notification is received and in time for candidate to meet resignation deadlines		