

LEADERSHIP APPOINTMENTS

GUIDANCE FOR GOVERNORS

(VA Schools, Foundation Schools & Academies)

DBE services

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This booklet is a revised version of advice produced by officers of
Church of England Dioceses and
the Methodist Church with officers of Lancashire CC

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TIME LINE FOR HEADTEACHER/DEPUTY APPOINTMENTS

Action	Task	Date
1. Vacancy identified	Head's resignation accepted	
2. Initial meeting of Governing Body	Job analysis Determination of salary Establishment of a selection panel	
3. Meeting of the Selection Panel (or initial meeting of full Governing Body)	Produce a timetable for recruitment Draw up the job description Draw up a person specification Draw up advertisement and choice of media Decide on information pack for applicants	
4. Advertise post	Forward advert to LA or place advert in press	
5. Information Pack for Applicants	Collate sufficient copies of information packs for despatch (school.LA)	
6. Closing date	Adhere to closing date for Equal opportunities purposes Collate completed application forms	
7. Meeting of the Selection Panel	Draw up a shortlist Determine selection activities Draw up questions for interview	
8. Interview arrangements	Venue booked Letter inviting candidates for interviews despatched with programme of events and expenses claim form References requested	
9. Familiarise candidates	Arrange school visits	
10. Selection process	Conduct assessments and interviews	
11. Provisional offer	Selection panel makes provisional offer of appointment to successful candidate	
12. Feedback to candidates	Feedback given by designated panel member/adviser	
13. Governing Body	Meeting to ratify decision of Selection Panel	
14. Diocese and LA	Diocesan Director and LA Children's Services notified of appointment	
15. Clearances	Evidence collected of qualification/medical and police checks	
16. Confirmation of Appointment	Letter confirming offer of appointment sent to successful candidate	
17. Appointee accepts	Letter of resignation sent to current employer	
18. Appointment commences	Appointee starts at school	

LEADERSHIP APPOINTMENTSGUIDANCE FOR GOVERNORS

A Vacancy Arises

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

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

THE INITIAL MEETING

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

Timescale

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

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

What the governors need to do	Notes for governors
2.1 Confirm vacancy	The advisers will provide a general overview of the appointment process
2.2 Note the appointment is made by the full governing body	Agree arrangements for any ratification meeting that is required.
2.3 Take note of the: <ul style="list-style-type: none"> • Appointment procedure • Employment legislation • Equal opportunity policy • Confidentiality • Safer Recruitment Guidance 	The advisers will give an overview of the issues and their implications
2.4 Agree job description (See Annex 1)	A Model/generic job description is provided for your consideration
2.5 Discuss and agree person specification/selection criteria using Annex 2 and Annex 3 provided	Need to decide the contents of the document and whether each criterion is essential or desirable
2.6 Agree use of confidential references	Agree the use of references. Other information from 'other sources' should not be sought by individual governors
2.7 Agree salary range	The LA provide relevant information to enable governors to decide on appropriate salary at which to advertise the post
2.8 Decide how to advertise the post	The governing body is asked to agree the wording for an advertisement in the national press. Usually headteacher & deputy headteacher posts are advertised (in print) throughout England & Wales, but the governors can decide to do otherwise. Advice from the LA and Diocese should be taken before deciding not to advertise. NB This may be delegated to a small committee.
2.9 Give early consideration to time scales for shortlisting, pre-interview visit, interviews, venues and ratification of appointment	Check when advert must be with LA Where possible please allow <ul style="list-style-type: none"> • 5 working days between closing date & short-listing • 10 working days between short-listing & interviews
2.10 Decide on the information to be sent to applicants	This is likely to include: <ul style="list-style-type: none"> • A copy of the advert wording • Letter from the Chair • Letter from the pupils or school council

	<ul style="list-style-type: none"> • Copy of a school newsletter • Relevant information about the school (often contained in the school brochure) • Details of the post • Key dates in the selection process • Arrangements for any pre-application visits to the school • Application form • Person specification • Church criteria (VA, Foundation Schools & Academies) • Job description • Parish / church magazine • Equal opportunities monitoring form • Information about the LA • Information about the Diocese • Information about the local area • Reference to the school's Child Protection Policy & Attendance Policy <p>Any other information the governors feel would give a flavour of the school and attract interested candidates to apply</p>
<p>2.11 Discuss and agree the composition of the appointment panel and the selection procedure</p>	<p>Discuss the procedure to be used at interview and number and range of governors to be involved.</p> <p>Governors taking part should ideally be available for the whole selection process</p>
<p>Following this meeting</p>	<p>Chair of Governors to</p> <ul style="list-style-type: none"> • confirm advert wording with the advisers • ensure any documentation required is forwarded to the LA • arrange an interview venue • check whether any governors not involved in this meeting are to be involved in future parts of the process • send all governors notification of the ratification meeting • forward the 'letter from the chairman' to the LA (for inclusion in the packs). LA to place advert • send out packs on request • send copies of all applications to all governors following the closing date • LA Adviser to confirm advert wording with Chair of Governors

	<p>Diocesan Adviser to</p> <ul style="list-style-type: none"> • Inform DBE of dates <p>Advisers and Governors to</p> <ul style="list-style-type: none"> • examine each application, the form and the letter of application, against the criteria agreed at the initial meeting
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Guidelines to assist governors of church schools in appointing a headteacher, deputy or assistant headteacher

SHORTLISTING MEETING

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

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

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

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

What the governors need to do	Notes for governors
3.1 Prior to the meeting the governors (individually) need to analyse all applications against the agreed selection criteria	Applications should be carefully checked to ensure that they fulfil all essential criteria. Original applications and any notification of criminal background are normally sent direct to the Chair of Governors
3.2 Agree: <ul style="list-style-type: none"> • Confidentiality/equal opportunities • Shortlisting procedure 	
3.3 Conduct initial screening to exclude any candidates who do not meet essential criteria	Advice will be offered on the shortlisting process
3.4 Consider all other applications against the agreed selection criteria and decide whether to:	

<ul style="list-style-type: none"> • Create a shortlist or • Re-advertise 	
<p>3.5 Finalise selection procedure, including:</p> <ul style="list-style-type: none"> • Tasks • Areas of questioning • Use of references • Composition of panels • Interview arrangements 	<p>Decide on activities, interviews etc., including the use of presentations, tasks and confidential references.</p> <p>It is important that the letter to candidates makes it clear whether the first day of a 2-day process is part of the selection process or not. If the governing body wish to include activities on that day (e.g. talking to school council) and these will be used to inform the decision, then the candidates need to be aware of this</p>
<p>3.6 Agree whether governors not present at the short-listing should participate in the interviews</p>	
<p>3.7 Agree arrangements for pre-interview visit for shortlisted candidates to the school</p>	<p>Decide who will be involved in the pre-interview visit.</p> <p>Usually Chair of Governors or a delegated governor with the visit taking place the afternoon before the formal interviews.</p> <p>Possible format:</p> <ul style="list-style-type: none"> • complete CRB documentation and other checks (qualifications & identity) with support from school admin staff • tour of the school in action • meet pupils • opportunity for candidates to seek information & clarification from the chair of governors
<p>3.8 Invite candidates for interview</p>	<p>LA will do this on behalf of the governing body</p>
<p>Following this meeting</p>	<p>Chair of Governors to</p> <ul style="list-style-type: none"> • confirm arrangements with the interview venue and confirm any technology requirements • confirm arrangements for the pre-interview visit <p>LA to</p> <ul style="list-style-type: none"> • write out to all short-listed candidates inviting them to interview and including a CRB form • request confidential references (individual & LA references)

	<ul style="list-style-type: none"> • confirm interview arrangements with the governing body • forward references to the adviser by the day before the interviews • check any reasonable adjustments required by candidates to allow them to access the interviews <p>LA Adviser to</p> <ul style="list-style-type: none"> • prepare some possible questions for different panels & the whole governing body to consider. <p>Diocesan Adviser to</p> <ul style="list-style-type: none"> • obtain faith references (all aided schools and certain other schools - obtain advice from the DBE) • prepare some possible questions for the whole governing body to consider. <p>Governors to</p> <ul style="list-style-type: none"> • re-read the person specification and job description • consider important areas to be covered at interview • consider areas for questions
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Go to Step 4 below.

Headteacher and deputy headteacher appointment - Step 4

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

INTERVIEWS

Assuming a two stage process

In preparation for the interview day the governors should:

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

- i. Note areas to be covered at the interview.
- ii. Re-examine each application against the information requested, noting areas requiring further explanation / information.

- iii. Re-read the school information pack and any other material relating to the needs of the post.
- iv. Consider areas for questions.

What the governors need to do	Notes for governors
4.1 Confirm arrangements for the day, including: <ul style="list-style-type: none"> • The roles of governors and advisers • The need for confidentiality/equality of opportunity • Questions • Conduct of interviews 	Decide how candidates will be 'graded' after the panel interviews and how these grades will be used by the full interview panel.
FIRST STAGE	
4.2 Conduct the first stage/panel interviews (if used)	
4.3 Discuss strengths and weaknesses of candidates and decide which, if any, to take forward to the second stage	It is possible to shortlist only one candidate providing they meet the essential criteria laid out in the person specification
4.4 Decide on the format of the afternoon and questions to be asked	
4.5 Agree how and when the unsuccessful candidates will be informed of the governors' decision not to continue with their application	The advisers and/or the chair of governors will inform unsuccessful candidates and the advisers will arrange to give professional advice and feedback to unsuccessful candidates
SECOND STAGE	
4.6 Conduct the second stage interviews	
4.7 Discuss the strengths and weaknesses of the candidates in relation to the selection criteria and decide whether to appoint or to re-advertise the post using the confidential references to confirm the decision	
4.8 Agree whether to appoint	If no appointment is to be made consider: <ul style="list-style-type: none"> a. Timetable for a new round b. Date for a new initial meeting c. other possible arrangements e.g. collaboration with another school
4.9 Decide how unsuccessful candidates will be informed	

<p>4.10 Conditionally offer the post to the successful candidate subject to ratification:</p> <ul style="list-style-type: none"> • Confirm start date and salary • Check identity 	
<p>4.11 Governing body meets to ratify the appointment</p> <ul style="list-style-type: none"> • Consider induction arrangements • Confirm the offer of appointment with the candidate (subject to CRB & other checks) 	<p>Chair of governors completes documentation after the appointment has been ratified.</p>
<p>4.12 Determine how and when any governors not present, the school community and the parents will be informed of the appointment</p>	
<p>4.13 Ensure all notes, application forms and letters of application are given to the LA adviser</p>	<p>The LA adviser will store/dispose of all papers as appropriate and provide feedback to unsuccessful candidates.</p>
<p>Following this meeting</p>	<p>Chair of Governors to</p> <ul style="list-style-type: none"> • liaise with the appointee re. announcements about the appointment • support the headteacher's induction and CPD (continuing professional development) <p>Diocesan adviser to</p> <ul style="list-style-type: none"> • notify DBE <p>Governors to</p> <ul style="list-style-type: none"> • support the headteacher's induction and CPD



School Use Only

REF
NO:**PRIVATE AND CONFIDENTIAL
APPLICATION FORM**Please read the notes on page 2
before completing this form.

for appointment as a _____ at

**Church of England Voluntary Aided
School/Foundation School/Academy**

at which the Governing Body is the employer.

PERSONAL DETAILS

Family name _____

Title _____

Other names in full _____**Preferred name** _____**DCSF number** _____**GTC Reg. No.** _____**NI number** _____**Permanent address** _____**If you have lived at this
address for less than 5
years, please list all other
addresses at which you
have lived during this** _____**Telephone numbers****Work** _____ **Home** _____ **Mobile** _____**May we telephone you at** **Yes** _____ **No** _____**Email address** _____**Are there any restrictions on your residence or employment in the UK?****If Yes, please give details** _____

Are there any adjustments that may be required should you be invited for interview? If so, please state here

REFERENCES

Please nominate two referees who are able to describe your suitability for this post. One referee should be your present or most recent employer, unless you have not worked before. References will not be accepted from those writing solely in their capacity of friends or relatives. References will be taken up before interview. We reserve the right to take up references with any previous employer.

Name	_____	Name	_____
Designation	_____	Designation	_____
Address	_____	Address	_____
Telephone No.	_____	Telephone No.	_____
E-mail	_____	E-mail	_____

Please let your referees know you have quoted them as referee and to expect a request for a reference should you be shortlisted

Governors give particular consideration to your application on the grounds of your religious commitment. Please give the name and address of the Vicar/Rector/Minister of the Church you attend.

Name..... Position.....
 Address..... Tel.no.....
 Email.....
 Name of church/ place of worship.....

NOTES TO APPLICANTS

- Before signing this form please check that every section has been completed.
- The form should be returned as instructed in the details of the post.
- Enclose a stamped addressed envelope if you wish us to acknowledge your application.
- Date of Birth: The Governing Body complies with the Employment Equality (Age) Regulations 2006 and does not discriminate on grounds of age. This is requested in line with best safeguarding practice including 'Safeguarding Children: Safer Recruitment and Selection in Education', DfES/1568 2005.
- The school's duty of care to the pupils requires that chronological information is sought. However, the selection process will be free of age-bias.
- Rehabilitation of Offenders Act 1974: You must declare all convictions that you have, including motoring offences and all convictions that have become "spent".
- Immigration, Asylum and Nationality Act 2006: Before taking a post applicants should provide one specified document or a specified combination of two documents that prove their entitlement to work in the UK:
- A Biometric Immigration Document issued by the Border and Immigration Agency to the holder which indicates that the person named in it is allowed to stay indefinitely in the UK, or has no time limit on their stay in the UK.
- A passport or other travel document endorsed to show that the holder is exempt from immigration control, can stay indefinitely in the UK, has the right of abode in the UK or has no time limit on their stay.
- All applicants must note that in accordance with the safeguarding vulnerable groups' regime, it is their responsibility to have made any necessary registrations relevant at the time of making this application, required for people working or volunteering with children. Accordingly, applicants are put on notice that no offer of employment will be made until the results of checks from the appropriate body have been received.
- Candidates are invited to support their application with a letter, following the specific instructions given in the details of the post. Curriculum vitae should not be enclosed.

Details of referees

- A passport showing that the holder, or a person named in the passport as the child of the holder, is a British citizen or a citizen of the UK and Colonies having the right of abode in the UK.
- A national passport or national identity card showing that the holder, or a person named in the passport as the child of the holder, is a national of a European Economic Area country or Switzerland.
- A residence permit, registration certificate or document certifying or indicating permanent residence issued by the Home Office or the Border and Immigration Agency to a national from a European Economic Area country or Switzerland.
- A permanent residence card issued by the Home Office or the Border and Immigration Agency to the family member of a national from a European Economic Area country or Switzerland, who is resident in the UK.
- One referee should be your current or most recent employer. If you are not currently working with children but have done so in the past, a reference will be required from the employer by whom you were most recently employed in work with children.
- The school will seek references on short-listed candidates, and may approach previous employers for information to verify particular experience or qualifications, before the interview.
- If you are currently working with children, on a paid or voluntary basis, your current employer will be asked about disciplinary offences relating to children, including any penalty which is time expired, and whether you have been the subject of any child protection concerns, and if so, the outcome of the enquiry or disciplinary procedure. If you are not currently working with children but have done so in the past, the relevant previous employer will be asked about those issues.
- References from relatives or friends writing solely as friends will not be accepted.

OTHER INFORMATION

Please state where you learned of this _____

Are you (or your spouse/civil partner) related by marriage, blood or as a co-habitee to any member of the Governing Body or holder of any senior office in the school or at the Local Authority? _____

If yes, please give their name & state relationship. _____

Failure to disclose such a relationship may lead to disqualification or dismissal without notice

EMPLOYMENT HISTORY

Name of current employer _____
 Local Authority, if _____
 Post _____
 Permanent or Temporary _____
 Address _____
 Telephone number _____
 Date appointed _____ Notice required or date _____
 Annual Salary _____
 Reason for leaving _____
 Main duties and responsibilities of your current or most recent _____
 Are you a member of the Local Government Pension _____

PREVIOUS EXPERIENCE

List your previous posts starting with the most recent. Please include all full-time, part-time and voluntary work.

Employer's name, address & nature of business	Full or Part Time	Job title & brief description of duties undertaken	Dates Month / Year		Reason for leaving
			From	To	

OTHER EXPERIENCE

If there are any periods of time that have not been accounted for, for instance, periods spent raising a family or of extended travel, please give details of them here with dates. The information provided in this form must provide a complete chronology from the age of 16; please ensure there are no gaps in the history of your employment and other experience.

CONTINUING PROFESSIONAL DEVELOPMENT

Please give details of any relevant CPD courses you have attended in chronological order starting from the most recent.

CPD Attended (description of the CPD and details of the provider)	Full or Part Time	Qualifications, date award made and Awarding Body	Dates Attended incl. Month / Year	
			From	To

EDUCATION AND QUALIFICATIONS

Please give details of any qualifications you have obtained in this country or abroad, in chronological order starting from the most recent. Please include any post-graduate or professional/vocational qualifications.

Establishment Attended Full Name & Address	Full or Part Time	Qualifications, date award made and Awarding Body	Dates Attended incl Month / Year	
			From	To

PLEASE NOTE THAT YOU WILL BE REQUIRED TO PRODUCE RELEVANT EVIDENCE OF QUALIFICATIONS ATTAINED.

Driving Licence Details

Do you have a valid UK driving licence? Yes..... No

GENERAL EXPERIENCE AND FURTHER INFORMATION

Please provide a written statement, no longer than 2 sides of A4, telling us how your experience, skills, training and/or qualifications in either paid or unpaid work, or through study, meet the selection criteria for this post. Short-listing will be based on the evidence you provide of your ability to meet the selection criteria described in the job specification for this post. You may wish to list your experience under sub-headings according to the selection criteria. **Please attach your statement to this form**

DECLARATION

I understand that in accordance with the Immigration, Asylum and Nationality Act 2006, the Governing Body will require new members of staff to provide documentary evidence that they are entitled to undertake the position applied for/have an ongoing entitlement to live and work in the United Kingdom. Therefore, on offer of and before commencing a position candidates should provide one of the specified documents listed in the Notes To Applicants (page 3).

I understand that appointment to this post is subject to a satisfactory Enhanced Criminal Records Bureau disclosure. I agree that the appropriate enquiry may be made to the Criminal Records Bureau about the existence and content of any criminal record.

I also understand that, under the terms of the Rehabilitation of Offenders Act 1974 (Exemptions) Order 1975, and subsequent amendments, I am required to disclose any record I may have of criminal convictions, and to attach details of such convictions. Information about criminal convictions will remain confidential and will not be used to determine your general suitability for employment. However, it will be made available to the panel should you be selected by them for appointment.

I confirm that I am not disqualified from working with children and/or included on the DCSF List 99.

I hereby give my consent for personal information (including recruitment monitoring data) provided as part of this application to be held on computer or other relevant filing systems and to be shared with other accredited organisations or agencies in accordance with the Data Protection Act 1998.

If you know that any of the information you have given on this application form is false or if you have knowingly omitted or concealed any relevant fact about your eligibility for employment then your name will be withdrawn from the list of candidates.

Providing false information is an offence and could result in this application being rejected. If such a discovery is made after you have been appointed then you will be liable to be dismissed summarily.

I hereby certify that all the information given by me on this form is correct to the best of my knowledge, that all the questions relating to me have been accurately and fully answered and that I possess all the qualifications which I claim to hold.

I understand that under legislation for the Protection of Children, I will be asked to agree to a check being made by the Criminal Records Bureau about the existence and content of any criminal record. I also confirm that I am legally entitled to work in the United Kingdom.

Signed

Date

Acceptable documents include: National Insurance card, a birth certificate issued in the UK or Eire, a P45 from your previous employer, a valid passport, or any relevant authorisation allowing you to work in the UK. XXXXXXXXXX
Please note that information about criminal conviction will remain confidential and will not be used to determine your general suitability for employment. However, it will be made available to the panel should be selected by them for employment.

DRAFT LETTER TO CANDIDATES

Dear

Appointment of Headteacher/Deputy Headteacher*

Further to your application for the above post, on behalf of the Governing Body, I am pleased to invite you for interview at [] at [] on []. The interview details are set out in this letter.

Pre-interview visit:

Arrangements have been made for candidates to visit the school prior to interview during []. Candidates should arrive at the school at []. On arrival candidates will meet []. There will be an opportunity for candidates to view the school and to meet staff and pupils. **This is not part of the selection procedure.**

In order to fulfil the requirements of the Government's Safeguarding Children & Safer Recruitment in Education guidance, **all** candidates must now have their identity confirmed. Therefore, please bring with you to the pre-interview a recent, clear, passport-sized photograph (your costs are non-refundable). The photo will be signed by a designated member of the appointing panel to confirm that it is a true likeness. If you are successful the photograph will be retained on your personal file; if you are unsuccessful you may request that it be returned. If you do not provide a photograph at the pre-interview then the panel may take the decision that you will no longer be considered for the post.

As part of the clearance process you are required to complete the enclosed Disclosure Application Form and bring it together with your original birth certificate and the following original documents to the pre-interview visit, in order to confirm your identity and current address and to meet the requirements of the Criminal Records Bureau:

DOCUMENTS YOU MUST PROVIDE AS EVIDENCE OF IDENTITY AND ADDRESS FOR COMPLETION OF YOUR DISCLOSURE APPLICATION FORM IN ADDITION TO YOUR BIRTH CERTIFICATE

EITHER: 2 documents from Group 1 below

Passport any nationality

UK issued Driving Licence England/ Wales/ Scotland/ Northern Ireland/ Isle of Man;

either photocard or paper. A photocard is only valid if the individual presents it with the counterpart licence

EU National Identity Card EU countries only

HM Forces ID Card (UK)

UK Firearms Licence

Adoption Certificate (UK)

OR: 4 documents from Group 2 Below

Marriage/Civil Partnership Certificate

Financial Statement** e.g. pension, endowment, ISA

Vehicle Registration Document (Document V5 old style and V5C new style only)

P45/P60 Statement (UK)**

Mail Order Catalogue Statement*

Bank/Building Society Statement*

Court Claim Form(UK)** documentation issued by Court Services

Utility Bill* electricity, gas, water, telephone – incl mobile phone contract/bill

Exam Certificate e.g. GCSE, NVQ, O/A Levels, Degree

TV Licence**

Addressed Payslip*

Credit Card Statement*

National Insurance Card (UK)

Store Card Statement*

NHS Card (UK)

Mortgage Statement**

Benefit Statement* e.g. Child Allowance, Pension

Insurance Certificate**

Certificate of British Nationality (UK)

Council Tax Statement (UK)**

Work Permit/Visa (UK)**

A document from Central/Local Government/Government

Agency/Local Authority giving entitlement (UK)* e.g. Department for Work and Pensions, the Employment Service, Customs & Revenue, Job Centre, Job Centre Plus, Social Security.

One of the following documents from the Borders and Immigration Agency (BIA) (formerly the Immigration and Nationality Directorate – IND) (UK).

NB: Do not use more than one of the following documents. Convention Travel Document (CTD), Stateless Person's Document (SPD), Certificate of Identity (CID), Application Registration Card (ARC)

Connexions Card (UK)

CRB Disclosure Certificate**

Letter from a Head Teacher*

Documents marked * should be less than 3 months old and those marked **issued within past 12 months

Under Safer Recruitment Regulations candidates will not be able to attend for interview unless these checks have been completed at the pre-interview visit

except in exceptional circumstances where a candidate is unable to attend the pre-interview visit.

The following candidates have been selected for interview:

- [Name 1]
- [Name 2]
- [Name 3]
- [Name 4]
- [Name 5]

Interview arrangements:

For example:

The first stage of the interview will require candidates to meet with small interview panels composed of members of the Governing Body and Advisers to discuss:

- Teaching, Learning and Curriculum (Panel 1)
- Leadership and Management (Panel 2)
- Church and Community (Panel 3)

Candidates will spend twenty minutes with each Panel. Candidates will give a presentation to the Panel for five minutes upon each of the topics and may, if they wish, use notes. Visual Aids (e.g. OHP, PowerPoint), may/may not be used. The presentation will be followed by discussion with the Panel about the issues raised and questions from Panel members. The timetable is attached.

PANEL	TOPIC	MEMBERS OF THE PANEL
1	Teaching, Learning and Curriculum	
2	Leadership and Management	
3	Church and Community	

Following the Panel interviews, Governors will decide which candidates they wish to see at the second stage, which will take place in the afternoon. Candidates asked to stay for the second stage will be required to start the interview by giving a presentation on how they see the role of Headteacher with particular reference to [] School. This should not exceed ten minutes and the interview will be developed from this presentation.

It is expected that the Governing Body will be able to inform you of their decision on the day.

The successful applicant will be required to produce original certificates for all qualifications stated on their application form prior to the appointment being confirmed. Candidates for headship who are working towards NPQH should bring along documentary evidence that they have been accepted onto the full programme.

References will be taken up on all shortlisted candidates and you are advised to remind your referees that under the Government's guidance on Safer Recruitment, a reference will be required before any offer of employment can be made. Your referees have been asked to return the reference before the interview date.

Travelling and subsistence expenses will be paid in accordance with the Authority's scheme. Expenses may be withheld from candidates who withdraw at the interview. An expenses claim form is enclosed.

Please telephone [] on [] to confirm that you will attend the pre-interview visit and the interview. Please let us know if you have any special needs that will require specific arrangements or adjustments to be made.

Yours sincerely

ENC
Reference request letter

Dear

NAME OF APPLICANT:
CURRENT POST:
POST APPLIED FOR:

I should be grateful if you could let me have your views on this applicant's suitability for the above post, details of which are enclosed. These views will enable the Selection Panel to decide which applicants most closely match the agreed selection criteria. References have been sought on all short-listed applicants.

It would be helpful if you would restrict your response to two sides of A4 paper, using the following paragraph structure:

1. How long you have known the candidate, in what capacity, and the dates they have been employed with you.
2. Current and previous contexts for the applicant's work where relevant.
3. Current range of responsibilities and experience and level of effectiveness in current post.
4. Educational philosophy, professional awareness and preparation for the post applied for.
5. Knowledge and skills, personal and professional qualities.
6. Any relevant additional information.

A judgement on the applicant's potential and suitability for the post, using as a final recommendation one of the following:

- (a) Recommended, without reservation, for appointment.
- (b) Strongly recommended for appointment.
- (c) Recommended for appointment.
- (d) Recommended for consideration.
- (e) Not recommended for appointment.

This position involves working with children and I would be grateful if you could state whether you have any reservations with regard to the applicant's suitability to work with children.

I would also be grateful if you could state whether the applicant has been subject to any disciplinary procedures where the sanction is current, or disciplinary procedures involving issues relating to the safety and welfare of children and young people, including those where the sanction has expired. Please also provide information of any genuine or malicious allegations that have been made about the applicant in relation to the safety and welfare of children and young people, including the outcome of those allegations.

If you are aware that this person has been disqualified from working with children you are required to include this in your reference.

Please note that under the Criminal Justice and Court Services Act 2000 it is an offence:

- (a) for an individual who has been disqualified from working with children to knowingly apply for, offer to do, or accept or do any work in a regulated position. An individual is disqualified from working with children if he/she is included on certain lists held by the Criminal Records Bureau, or has been disqualified from working with children as part of a sentence.
- (b) to knowingly offer work in a 'regulated position', i.e. work which will have regular contact with children, to a disqualified individual or to fail to remove an individual from such work.

Please be aware that under certain circumstances, Data Protection legislation provides for references to be disclosed to applicants where requested.

The Selection Panel will be meeting to interview candidates on _____ and it would assist the process if you could forward the reference electronically to the e mail address at the top of this letter or if this is not possible return it in the enclosed stamped, addressed envelope.

In accordance with Government's guidance on Safeguarding Children a reference will be required before any offer of employment can be made.

The Selection Panel have asked me to express their appreciation of your help.

This reference may be shown to the candidate at interview unless it is headed "confidential".

Yours sincerely

ENC

**CONFIDENTIAL REPORT ON THE SUITABILITY OF A CANDIDATE WHO IS
BEING CONSIDERED FOR APPOINTMENT TO THE HEADSHIP OF A SCHOOL**

Name:

Current post:

Has applied for the post of:

Known strengths of the candidate

Code of Practice - Comments upon the candidate's suitability for appointment:

	Yes/No	If yes, please comment
Is the candidate or has he/she been the Headteacher or senior teacher of a school placed in special measures or serious weaknesses for reasons attributable to his/her performance?		
Does the candidate teach in a school in which standards of performance in NC assessments or public exams have worsened for reasons attributable to his/her performance?		
Is the candidate the subject of a pattern of repeated and serious complaints not yet fully investigated and/or addressed?		
Is the candidate or has he/she been the Headteacher or senior teacher of a school in which mis-management has led or is leading to suspension of delegation for reasons attributable to the candidate?		

Known areas for improvement / reservations (not indicated above)

How highly do you rate the candidate's suitability for the post?

Please tick one box:

* Recommended for appointment, without reservation	Strongly recommended for appointment	Recommended for appointment	Recommended for consideration	Not recommended

** NB This level of recommendation should normally only be used if the candidate has previously demonstrated their abilities in a post at this level.*

**NAME AND TITLE OF PERSON
MAKING RECOMMENDATION**

SIGNATURE

LETTER REQUESTING FAITH REFERENCE

Dear

Name of applicant:

Post applied for:

I should be grateful if you would let me have, in strict confidence, your views on this applicant's suitability in terms of faith commitment for the above post. These views will help the governing body to decide which applicant most closely matches their agreed selection criteria. Confidential references are being sought on all applicants who are to be interviewed.

The governing body would appreciate an indication of your judgement and experience of the applicant on the following matters.

1. Does the applicant attend your Church? With what degree of frequency?
2. What is your assessment of the applicant's commitment?
3. What is the applicant's current involvement in and commitment to Church and community life?
4. What is your assessment of the quality of the applicant's relationship(s) within the parish?
5. From your knowledge of the applicant's faith and character, does the applicant have the necessary leadership qualities to promote the Christian ethos required of this post?

The governing body meets to interview the candidate on:

I should be grateful for an early reply.

The governing body very much appreciates your help.

Yours sincerely

SUPPLEMENTARY GUIDANCE ON EMPLOYMENT CHECKS

1. Governing bodies must undertake the relevant employment checks (in respect of Regulations 12 and 24 of the School Staffing (England) Regulations) to establish:
 - the preferred candidate's identity;
 - their qualifications; and
 - their right to work in the United Kingdom.
2. It is important that those considering applications for teaching posts, including head teacher and deputy head teacher posts, take into account the range of tools at their disposal when making appointments. For example, governing bodies should consider the appropriateness of including the observation of trial lessons as part of an extended interview process and should ask interviewees whether they have been the subject of capability procedures in the last two years.
3. Once there is a preferred candidate and before any appointment is made, governing bodies should:
 - take up references from the applicant's current or former employer, following up with the author of the references if there is anything that appears to be contradictory or incomplete;
 - consider asking the candidate's current employer for details of any capability history in the previous two years, and the reasons for this. Governing bodies of maintained schools must confirm in writing whether or not a teacher at the school has been the subject of capability procedures within the last two years and, if so, provide details of the concerns which gave rise to this, the duration of the proceedings and their outcome, if asked to do so by the governing body of any maintained school or the proprietor of an Academy School to which that person has applied for a teaching post (Regulation 8A);
 - consider whether the candidate has the necessary health and mental fitness to teach, including whether any reasonable adjustments are required to enable the individual to provide effective and efficient teaching (as required by the Education (Health Standards) (England) Regulations 2003). Governing bodies should ensure that their recruitment policies and practices comply with section 60 of the Equality Act 2010 as well as the Education (Health Standards) (England) Regulations 2003;
 - consider the flexibilities that exist to make appointments subject to the successful completion of a probationary period in order to provide the opportunity to assess an applicant's suitability for the post over a period of time.

4. When making any appointments, due consideration must be given to the requirements of equalities legislation and to best employment practices;
and

5. When sharing information governing bodies should ensure that they act in accordance with the Data Protection Act 1998 and data protection principles, making sure that the information provided to prospective employers is fair and transparent. It is good practice to make teachers aware in the school's policies that information about performance and capability will be provided to potential employers when requested. Similarly, when requesting information, governing bodies should explain why information is being sought, what it will be used for and how long it will be retained.

Information from DfE December 2013

MODEL WRITTEN STATEMENT OF APPOINTMENT FOR VA SCHOOLS/FOUNDATION SCHOOLS/ACADEMIES

Notes

The National Society Contract is recommended. However, a contract of employment does not have to be in writing for it to be valid in law, but it is a legal requirement to provide employees with a written statement of their main terms of employment within two months of the start of their employment.

As a minimum the written statement must cover the following

- Names of the parties
- Date on which employment began
- Date on which the period of continuous employment began
- Scale, rate or method of calculation remuneration
- Pay intervals at which remuneration is paid
- Hour of work
- Holiday entitlement
- Provisions for sick leave and sick pay
- Details of pension scheme
- Notice period
- Where the post is not permanent, the fixed term or period of the employment
- The employee's expected place of work and the address of the employer
- Details of any collective agreements affecting the employment
- Where the employee is expected to work outside the UK
- Details of the disciplinary and grievance procedures and where they can be found
- To whom the employee can appeal if dissatisfied with any disciplinary sanction imposed upon them
- With whom the employee can raise a grievance, and how it should be raised.



HEADTEACHER CONTRACT

Voluntary Aided or Foundation School

Dated of

CONTRACT OF EMPLOYMENT

Between the GOVERNING BODY of

School

and

CONTENTS

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CONTRACT OF EMPLOYMENT

This Contract of Employment incorporates the written statement of particulars of employment, which is required by the Employment Rights Act 1996.

1 DETAILS OF PARTIES

EMPLOYER: The Governing Body of
 School
 of (“the Governing Body”)

EMPLOYEE: of (“the Headteacher”)

2 DETAILS OF APPOINTMENT

See Note on page 10.

JOB TITLE at the School

Your job description is attached. It may be subject to annual revision in consultation with you.

3 COMMENCEMENT OF EMPLOYMENT

This will be the date from which the Headteacher first started paid employment at the school and may differ from the date on which the contract is signed.

This appointment commences on the day of .

4 CONTINUOUS SERVICE

See Note on page 10 and delete an appropriate. Any previous service with another maintained school within the same LA or with the LA itself may be considered by the GB to be continuous service

For purposes of establishing statutory employment rights your period of continuous service commenced on the day of .

This is the date you started working at the School, unless employment with a previous Governing Body of a Voluntary Aided or Foundation School or Local Authority counts as continuous service under the Employment Acts.

For the purposes of determining redundancy payments, continuous service with local authorities and with certain other specified employers will be aggregated with your service at the School in accordance with The Redundancy Payments (Continuity of Employment in Local Government,) (Modification) Order 1999 as amended and/or The Teachers (Compensation for Redundancy and Premature Retirement) Regulations 1997 (as amended). Accordingly, your period of continuous employment in respect of redundancy entitlement dates from .

5 DURATION OF CONTRACT

If the post is for a specified period, insert fixed period to include termination date.

Your post is permanent and full-time.

Or

Your post is a fixed term full-time post and will terminate on .

If the post is for a fixed term the reason is .

If the post is part time, insert the proportion of hours relative to an equivalent full time employee .

6 PLACE OF WORK

Your place of work will be School (“the School”)
At and any other location which forms part of the premises of the School or elsewhere as may reasonably be required by the Governing Body from time to time.

7 HOURS OF WORK

You are required to be available for work at all times during normal working hours in term time and at such other times as the Governing Body may reasonably direct, subject always to the provisions of the School Teachers Pay and Conditions Document (“STPCD”) and the provisions of The Working Time Regulations 1998 (as amended). In addition, you are required to work such reasonable additional hours as are necessary to enable you to discharge your professional duties effectively. You are entitled to a break of reasonable length in the course of each school day and shall arrange for a suitable person to assume responsibility for the discharge of your functions as headteacher during that break.

You are entitled to enjoy a reasonable work/life balance.

Your terms and conditions shall include, as far as reasonably practicable (but having regard to any teaching responsibilities) reasonable time for discharging your management and leadership responsibilities. In addition, if you do participate in teaching, you will be entitled to planning and preparation time, in accordance with sections 63.5 – 63.8 of the STPCD, which will not be less than 10% of the total hours of work in any event.

8 HOLIDAYS

This date should be the start of the school year and may not be 1 September in some LAs.

Your leave year commences on 1 September. Subject to clause 7 above and the provisions of the current School Teachers Pay and Conditions Document (“STPCD”), your entitlement to leave coincides with periods of school closure and public holidays, details of which will be notified to you by the School from time to time. Current information relating to school closure and in-service training days is available at the School. You will be paid full salary during these closure periods, unless you are receiving less than full salary arising from the application of the sick pay scheme, maternity and other family leave schemes or for some other reason specified in writing to you.

The Governing Body, or in a case of urgency, the Chairman, may at its discretion grant you occasional leave of absence within the limits and upon the conditions relative to payment of salary prescribed by the Governing Body on compassionate or other grounds.

You are entitled to your statutory rights in relation to family leave and time off for dependents.

9 SALARY

- 9.1 Your Salary will be determined in accordance with the provisions set out in the STPCD and, where appropriate, the Local Authority’s pay scale (the National Joint Council or the Greater London Provincial Council, as appropriate). Insofar as the Governing Body is able to award spinal salary points, your salary will be reviewed annually and you will be advised of the outcome of each such review. Any other variations in salary will be notified to you.
- 9.2 You will be paid monthly in arrears not later than the last day of each calendar month by credit transfer into a bank or building society account of your choice.
- 9.3 Your salary will be paid within Group for Headteachers.
- 9.4 Your salary at the commencement of your employment will be:
Point on the pay spine for the Leadership Group within the seven point individual school range to determined by the Governing Body: £ .

Total pay: £ per annum
- 9.5 You will also receive reasonable expenses which you incur in the performance of your duties (in accordance with the Governing Body’s expense claim policy as set out in the Staff Handbook). Such expenses must be properly evidenced.
- 9.6 You are not required to undertake any out-of-school activities/CPD/ITT and, where you do so, you will be paid at the rate of £ .
- 9.7 You agree that the Governing Body may deduct from any salary or other payment due to you any amount owed by you to the School, following prior notification to you. Arrangements to repay any over-payments will be made with the intention of avoiding hardship.
- 9.8 There will be an annual review of pay by no later than 31st August each year and any pay increase will take effect from the 1st September that follows.

Insert School Group size.

For instance, if your salary has been overpaid for any reason.

10 TERMS AND CONDITIONS OF EMPLOYMENT

- You are to exercise the professional duties and maintain the professional standards of a Headteacher in the School under the directions of the Governing Body and in accordance with:
- i. the provisions of the Education Acts and any associated Regulations and Orders made thereunder;
 - ii. the conditions of employment prescribed in the STPCD from time to time in force, including the National Agreement on Raising Standards and Tackling Workload and the Education (Specified Work and Registration) (England) Regulations 2003 (as amended) or the Education (Specified Work and Registration) (Wales) Regulations 2004 (as amended);
 - iii. the Trust Deed and the Instrument of Government of the School;
 - iv. any regulations, policies or procedures of the Governing Body;
 - v. such portions of the Manual of Conditions of Service for Schoolteachers in England and Wales (known as the Burgundy Book) which are not inconsistent with the terms of this Contract;
 - vi. the any local collective agreements recognized by the Governing Body to the extent that it is consistent with i. – iii. above and iv. above as adopted by the Governing Body;
 - vii. the any scheme proposed by the local authority under section 48 of the School Standards and Framework Act 1998.

In carrying out your duties, you shall consult, where appropriate, with the Diocese, the local authority, the Governing Body, the staff of the School and the parents/carers of its pupils. You shall participate in the selection and appointment of the teaching and non-teaching staff of the School, subject to the advice of the Diocesan Director of Education and the local authority as appropriate and as agreed with the Governing Body.

You shall secure that all pupils in attendance at the School take part in daily collective worship in pursuance of your duty under section 70 of the School Standards and Framework Act 1998 and securing that worship is in accordance with the teachings of The Church of England.

In the event of any conflict, the terms of this Contract shall prevail.

The documents mentioned in clauses 10 and 11 may be inspected at one or other of the offices of the LA or the School.

11 LOCAL AGREEMENTS

See Note on page 10.

Local Collective Agreements are not applicable unless specifically entered into by the Governing Body. Any such Agreements are listed in the first schedule to this Contract.

12 NOTICE AND TERMINATION OF EMPLOYMENT

Subject to the provisions of the Education Acts and to any Regulations made thereunder, this appointment may be terminated by the following notice period, given in writing either by you or by the Governing Body:

- i. Three months' notice expiring on 31 December or 30 April
- or
- ii. Four months' notice expiring on 31 August.

In the event of your contract being terminated by the Governing Body on giving the required notice, the Governing Body reserves the right to pay you in lieu of notice and require you not to attend at the School during the notice period.

It shall be sufficient that any notice given by the Governing Body under this Clause shall be signed by the Chair or Clerk on their behalf. Any such notice given by the Governing Body may be served by delivering it to you or by leaving it at your last known place of residence or by sending it in a prepaid letter addressed to you at that place. Any notice given by you under this Clause must be in writing and may be served by delivering it to the Chair or Clerk or by sending it in a prepaid letter to such Chair or Clerk at his place of residence or care of the School.

In the case of a fixed-term contract, your employment terminates automatically on the date specified in clause 5.

In the case of any other type of temporary contract for an indefinite period, your employment terminates automatically on the school day preceding the happening of the event specified in Clause 5.

In the event of redundancy, compensation shall be determined in accordance with the relevant statutory provisions, including The Teachers' (Compensation for Redundancy and Premature Retirement) Regulations 1997, the Redundancy Payments (Continuity of Employment in Local Government etc.) (Modification) Order 1999 and the Burgundy Book.

The Governing Body reserves the right to dismiss you without notice in the event of gross misconduct in accordance with its agreed disciplinary policy

13 CHARACTER OF THE SCHOOL

See Note on page 9
The second sentence can be deleted if the Headteacher is not required to give religious education. The second and third sentence should be deleted for a Headteacher in A Foundation school.

As the Headteacher of a **Select** School you are required to have regard to the Christian character of the School and its Foundation and to undertake not to do anything in any way contrary to the interests of the Foundation.

You are required to give and/or supervise the giving of religious education in accordance with the doctrines of the **Select** and the Trust Deed of the School.

You are required to take part in and lead acts of religious worship.

You are expected to be conscientious and loyal to the aims and objectives of the School.

14 SICKNESS ABSENCE

See Note on page 9.

You shall comply with the provisions for dealing with incapacity for work due to sickness which are contained in the Governing Body’s sickness absence procedure contained in the Staff Handbook, and which shall comply with the relevant provisions of the Burgundy Book. Entitlement to sick pay as set out in the Burgundy Book is based on aggregate teaching service (excluding breaks in service). Where such absence occurs you should ensure that your line manager is notified at the earliest opportunity of the absence and when your illness commenced and, if possible, not later than on the first day of absence. For absences of four and five working days you are required to complete a self-certified form. For absence beyond five working days you are required to obtain a medical statement signed by a doctor. Sick pay shall be calculated in accordance with the relevant provisions of the Burgundy Book.

15 MATERNITY LEAVE PROVISIONS

Provisions for maternity leave shall be those set out in the Burgundy Book, without prejudice to any additional rights provided by the Employment Acts and/or agreed locally, where ratified by the Governing Body.

16 PATERNITY AND ADOPTION PROVISIONS

You shall be entitled to statutory paternity and/or adoption leave and pay, without prejudice to any additional rights incorporated into the Burgundy Book from time to time.

17 HEALTH & SAFETY and SAFEGUARDING

You will familiarize yourself with and follow the School’s policies on Health and Safety at Work and Safeguarding requirements (and subsequent revisions thereof).

18 PENSION

If your employment is full-time or part time and you are between the ages of 18 and 75, you shall automatically become a member of the Teachers’ Pension Scheme (“TPS”). At any time, you can opt out of the scheme and make alternative arrangements.

If you choose to remain in the TPS you will be required to contribute to it at the rate of % of your salary. Contributions are deducted under the TPS on a contracted-out basis (in respect of which a contracting-out certificate is in force), as the TPS applies in place of the State Earnings Related Pensions Scheme (“SERPS”). If you choose to opt out of the TPS, you will cease to be contracted out and, unless you take out your own contracted-out personal pension, you will have to contribute to SERPS.

**19 GRIEVANCE,
DISCIPLINARY AND
CAPABILITY
PROCEDURES**

See Note on page 9.

A copy of the non-contractual Grievance Procedure from time to time in force applicable to your employment is contained in the Staff Handbook. Brief details are set out in the second schedule to this Contract. If you have a grievance relating to your employment at the School you should raise it as specified in the document.

The non-contractual disciplinary rules and procedures from time to time in force applicable to your employment are contained in the Staff Handbook. Brief details are set out in the Third Schedule to this Contract.

Your employment is subject to performance review and in the event that you do not achieve the standards expected by the Governing Body, the School's non-contractual Capability Procedure (as in force from time to time) will apply. The School's Capability Procedure is contained in the Staff Handbook Brief details are set out in the Fourth Schedule to this Contract.

The Grievance, Disciplinary and Capability procedures do not create contractual rights enforceable by you against the Governing Body but you must comply with them.

The Governing Body may alter procedures and rules (to include non-contractual Grievance, Disciplinary and Capability procedures) from time to time, as applicable.

**20 MEMBERSHIP OF
TRADE UNION**

You have the right to be a member of a Trade Union of your choice and to take part in its lawful activities.

21 CONFIDENTIALITY

Without prejudice to the Governing Body's procedure for making a disclosure in the public interest ('Whistle Blowing') as set out in the Staff Handbook, you may not during or after the termination of your employment disclose to anyone other than in the proper course of your employment, or if required to do so by law, any information of a confidential nature relating to the School

**22 ALTERATIONS TO
CONTRACT**

See Note on page 9.

The Governing Body reserves the right to make non-material alterations to the terms of your Contract after consulting with you. Any such alterations will be notified to you in writing within one month of the Governing Body's decision

There will be two identical copies of the Contract, each signed by both parties

SIGNED by	Chair/Clerk
For and on behalf of the Governing Body of the School	
SIGNED by	Employee

The marginal notes and footnotes do not form part of this Contract.

FIRST SCHEDULE

The Governing Body should list the local agreements referred to in Clause 11.

The full explanation of the following schedules can be found in “*Grievance and Discipline Procedures for employees in Voluntary Aided and Foundation Schools*” and “*Capability Procedures for employees in Voluntary Aided and Foundation Schools*” and are contained in the Staff Handbook.

SECOND SCHEDULE

Summary of grievance procedure

A	B
Stage	Description of action
1. Informal	<ul style="list-style-type: none"> • Informal meeting of grievant and line manager or HT after meeting requested by grievant in attempt to resolve
2. Formal	<ul style="list-style-type: none"> • Letter from grievant to line manager or HT setting out complaint • LM or HT meets grievant after notice of grievance or complaint in attempt to resolve
3. Formal	<ul style="list-style-type: none"> • If grievance is continued after meeting with LM or HT, grievant writes to Clerk of the GB asking for a GB Committee to hear grievance • Letter from Clerk of the GB to grievant advising him/her of time and venue for grievance meeting and of right to be accompanied by work colleague or trade union representative • Copies of documents sent before meeting to parties involved in hearing • Grievance meeting • Decision communicated in writing to grievant setting out what action employer intends to take to resolve grievance
Appeal	<ul style="list-style-type: none"> • If you are not satisfied with decision of the committee or the Chair of Governors, you may appeal to the governing body within 10 school days of receiving notification of the decision • The Appeal will be heard as soon as reasonably practicable at an agreed time and place • You have a statutory right to be accompanied by a work colleague or a trade union representative at an appeal hearing • You will be informed in writing of the result of the appeal hearing as soon as reasonably practicable.

THIRD SCHEDULE

Summary stages of disciplinary procedure

A	B
Stage	Description of action
	<ul style="list-style-type: none"> • Informal discussion(s) • Informal note kept on file for 6 months
1. Formal	<ul style="list-style-type: none"> • Letter to individual setting out complaint and notification of preliminary investigatory meeting (if appropriate) • Investigating Officer and individual meet to discuss investigation if appropriate* • At conclusion of investigation, Investigating Officer notifies individual in writing of findings and whether or not there is a case to answer. If so, advises of time and venue for disciplinary meeting and of right to be accompanied by a work colleague or trade union representative* • Copies of documents sent before meeting to parties involved in hearing* • Disciplinary hearing • Where misconduct is confirmed, First Written Warning • Notes of meeting and signed copy of warning placed on file • Warning remains on file for 12 months
2. Formal	<ul style="list-style-type: none"> • Procedure * above repeated • Where misconduct is confirmed, Final Written Warning • Record of meeting and signed copy of warning placed on file • Warning remains on file for 24 months or indefinitely
3. Formal	<ul style="list-style-type: none"> • Procedure * above repeated • Where misconduct is confirmed: <ul style="list-style-type: none"> ○ Governors disciplinary committee considers what action to take, including whether to dismiss: OR Chair of Governors considers what action to take including whether to dismiss
Appeal	See below under Fourth Schedule

FOURTH SCHEDULE

Summary stages of capability procedure

A	B
Stage	Description of action
Informal	<ul style="list-style-type: none"> • Informal action • Informal notes made of discussion to include details of further support, monitoring, success criteria and time scale
1. Formal	<ul style="list-style-type: none"> • Where poor performance is confirmed, First Written Warning (to include setting of targets agreed by all parties (with timescale) and additional support agreed) • Notes of meeting and signed copy of warning placed on file • Warning remains on file for 12 months
2. Formal	<ul style="list-style-type: none"> • Procedure * above repeated • Where poor performance is confirmed, Final Written Warning (to include setting of targets agreed by all parties (with timescale) and further additional support agreed) • Record of meeting and signed copy of warning placed on file • Warning remains on file for 24 months
3. Formal	<ul style="list-style-type: none"> • Procedure * above repeated • Where poor performance is confirmed: <ul style="list-style-type: none"> ○ Governors capability committee considers what action to take, including whether to dismiss: OR Chair of Governors considers what action to take including whether to dismiss
Appeal	<ul style="list-style-type: none"> • If you are not satisfied with the decision of the Committee or the Chair of Governors you may appeal to the governing body within 10 school days of the notification of the decision • The Appeal will be heard as soon as reasonably practicable at an agreed time and place • You have a statutory right to be accompanied by a work colleague or a trade union representative at an appeal hearing • You will be informed in writing of the results of the appeal hearing as soon as reasonably practicable.

NOTES RELATING TO THE CONTRACT

“Diocesan Board of Education”

References to the Diocesan Board of Education are to the Board constituted in your diocese under the Diocesan Boards of Education Measure 1991 (as amended).

Clause 3

This clause contains two optional provisions. The part of the clause dealing with a probationary period should only be retained if the appointment is in fact subject to a probationary period. The clause also includes wording appropriate for a fixed term contract. Fixed term contracts should only be used in circumstances that justify not giving a permanent contract. If a fixed term contract is not renewed when it expires, that amounts in law to a dismissal and could give rise to a claim for unfair dismissal or redundancy compensation. It is therefore important that the reason for the temporary nature of the contract is discussed with the Employee at the time of appointment. Inserting the reason for the fixed term here is an acknowledgment of that reason by the Employee.

Clause 4

In order to confirm the date on which continuous service commenced, it may be necessary to refer to the previous employer or Local Authority.

Clause 7

For employees subject to incremental progression, add the date of the next increment. Delete if individual is already on the maximum of the salary range. New employees may receive an increment six months after their start date dependent upon local agreements and paid in line with other support staff thereafter until the maximum of the salary range is reached.

Clause 9

The minimum periods of notice to be given by an employer are governed by the Employment Rights Act 1996:

Continuous service	Period of notice
One month or more but not less than two years	Not less than one week
Two years or more but less than twelve years	Not less than one week for each year of continuous service
Twelve years or more	Not less than twelve weeks

Clause 11

Voluntary Aided schools are only bound by Local Collective Agreements if the governing body of the school had authorised the Local Authority to enter into such Agreements on its behalf, or has specifically entered into them itself. If the governing body has entered into any Local Agreements, these must be listed in the First Schedule to the contract and copies made available for employees to inspect in the school office. Examples of Local Agreements are Joint Consultative Committees, Collective Dispute Agreements and agreements on additional leave of absence.

Clause 12

Governing bodies are strongly advised to formally adopt the procedures included in *Managing Staff Sickness Absence* available from their Diocesan Board of Education or from the National Society web site www.churchofengland.org/education/national-society

Clause 16

A copy of the full grievance, disciplinary and capability procedures (which are non-contractual) must be available for inspection in the school and be reasonably accessible to the employee. The schedules give an outline of the procedure but little detail. The National Society strongly recommends that the governing body adopts the forms of grievance, discipline and capability procedures which have been published by the Society on its website (as above) in association with this Contract.

Clause 19

The occupation of residential accommodation may be an essential part of the job, in which case the Employee will occupy as a licensee without security of tenure. In other cases, where the occupation of accommodation is merely desirable or is a benefit in kind the Employee may acquire a tenancy which could continue even if the employment is brought to an end.

Clause 20

Any material alteration to an employee's contract which is made without his/her agreement will constitute a breach of contract and may result in the employee making a claim for damages to a county court and/or making a claim for unfair dismissal to an employment tribunal. However, non-material changes can be made under this provision. These will be non-contentious and probably minor in character. If in doubt legal advice should be sought. There is a body of case law that defines what is and what is not a material change.

GUIDANCE NOTES

1 Outside contract

These guidance notes are designed to help governors in issuing a contract and **do not form part of the contract itself**.

2 Read by employee

It is important that the employee reads carefully the details of the contract before signing.

3 Preparation

The form of contract has been prepared by the National Society with the assistance of the London Diocesan Board for Schools and the Southwark Diocesan Board of Education, together with their respective legal advisers, Lee Bolton Monier-Williams and Winckworth Sherwood. It is recommended by them for use in Voluntary Aided and Foundation schools. Support Staff Unions have been fully consulted.

4 Other contracts

All people working at the school are employees of the governing body, except those who provide welfare services, or in some cases, those who provide school meals. The governing body should ensure that all their employees are given a contract of employment with the governing body and no other contract.

5 Amendments

The contract may be altered if the parties wish but legal advice on any material alterations should be sought. Any amendment or deletion to the contract should be typed in before it is signed. If amendments or deletions are made by hand, they should be initialled by both parties.

6 Date

It is important that both copies of the contract have the same date on the cover. This may, however, not be the same date as the commencement date in clause 3 of the contract. The date of the contract must be the date of the second signature (normally the employee's) and may be before or after the commencement date. The commencement date is the date from which the employee was first paid. For example, if the contract is issued to existing staff, the commencement date may be some years previously.

7 Signing

For each employee, there should be two identical copies of the contract, each signed by both parties. It is recommended that both copies of the contract are signed on behalf of the school and sent to the employee, who will then sign and date them before returning one to the school and retaining the other.

8 Existing staff: new contracts

It is important to note that new contracts can only be issued to existing staff with their agreement. A contract cannot be imposed unilaterally. However, every effort should be made to persuade existing staff to transfer to new contracts so that all employees are on the same form of contract. Some existing employees may still be on the previous National Society contracts. This contract does not worsen their terms of employment in any way, but provides additional detail.

9 Letter of Appointment

It is normal practice that new employees are sent a letter of appointment immediately after a successful interview. The contracts will then be prepared and signed on behalf of the governing body and sent to the employee later.

10 Time limit

So long as the contract is sent within 8 weeks of the commencement of employment, there is no need for a separate Written Statement of Particulars as required by the Employment Rights Act 1996. The contract includes all those details which are required to be given to an employee and therefore the need for a separate statement is avoided.

11 Job-share contract

If a governing body wishes to issue a job-share contract, it should consult with its Diocesan Board of Education.

12 Further copies

Copies of this contract and the non-contractual grievance and discipline procedures are available to download on the National Society web site –

www.churchofengland.org/education/national-society. The procedures are also available from the Diocesan Board of Education.

There are eight versions of the contract:

Teacher including Excellent Teacher (other than deputy, assistant or headteacher) full-time or part-time VAF/1/11

Advanced Skills Teacher VAF/2/11

Deputy or Assistant Headteacher VAF/3/11

Headteacher VAF/4/11

Support Staff (full-time or part-time) all year round VAF/5/11

Support Staff (full-time or part-time) term time only VAF/5a/11

Clerk to the Governing Body all year round VAF/6/11

Clerk to the Governing Body term time only VAF/6a/11

13 Governors' copy

The Governors' signed copy of the contract should be kept in the employee's personal file in the school office.

CONTRACT DRAWN UP BY:**The National Society**

Church House Great Smith Street, London SW1P 3AZ

With **Southwark Diocesan Board of Education**

48 Union Street London SE1 1TD

& **London Diocesan Board for Schools**

36 Causton Street London SW1P 4AU

Available from the National Society Web site: as above.

ANNEX 1 HEADTEACHER JOB DESCRIPTION

Church of England Voluntary Aided Schools/Foundation Schools/Academies

This appointment is with the governing body of the school under the terms of the National Society Contract signed by the governors as employees.

This job description reflects the **National Standards of Excellence for Headteachers** (2015). These standards are built upon The Teaching Standards (2011) which apply to all teachers, including headteachers.

The appointment is subject to the current conditions of employment of headteachers, contained in the **School Teachers' Pay and Conditions** document and other current educational and employment legislation, including that of the Department for Education, and the terms of the National Society contract. In carrying out his/her duties, the headteacher shall consult, where appropriate, with the Local Authority, the governing body, the staff of the school, its pupils and the parents of its pupils.

A. The Core Purpose of the Headteacher

The headteacher is the prime mover in creating, inspiring and embodying the Christian ethos and culture of this Church school, securing its Mission statement with all members of the school community and ensuring an environment for teaching and learning that empowers both staff and students to achieve their highest potential.

The core purpose of the headteacher is to provide professional leadership and management for the school within the context of the Trust Deed. This will promote a secure foundation from which to achieve high standards in all areas of the school's work. To gain this success the headteacher must establish high quality education by effectively managing teaching and learning and using personalised learning to realise the potential of all pupils. The headteacher should establish a culture that promotes excellence, equality and high expectations of all pupils within a strong Christian ethos.

The headteacher is the leading professional in the school. Accountable to the governing body, the headteacher provides vision, leadership and direction for the school and ensures that it is managed and organised to meet its aims and targets. The headteacher, working with others, is responsible for evaluating the school's performance to identify the priorities for continuous improvement and raising standards; ensuring equality of opportunity for all; developing policies and practices; ensuring that resources are efficiently and effectively used to achieve the school's aims and objectives and for the day-to-day management, organisation and administration of the school.

The headteacher, working with and through others, secures the commitment of the wider community to the school by developing and maintaining effective partnerships with, for example, schools, other services and agencies for

children, the Local Authority, the Diocese, higher education institutions and employers. Through such partnerships and other activities, headteachers play a key role in contributing to the development of the education system as a whole and collaborate with others to raise standards locally.

Drawing on the support provided by members of the school community, the Headteacher is responsible for creating a productive learning environment which is engaging and fulfilling for all pupils.

B. The Four Domains of Headship

Domain One: Qualities and knowledge.

Within the school's Christian ethos, the headteacher will:

1. Hold and articulate clear Christian values and moral purpose focused on providing a world-class education for the pupils they serve and reflecting the Church foundation of the school.
2. Demonstrate optimistic personal behaviour, positive relationships and attitudes towards their pupils and staff, and towards parents, governors and members of the local Church and wider community.
3. Lead by example – with integrity, creativity, resilience, and clarity – drawing on their own scholarship, expertise and skills, and that of those around them.
4. Sustain wide, current knowledge and understanding of education and school systems locally, nationally and globally, and pursue continuous professional development that reflects the needs of a Church of England school.
5. Work with political and financial astuteness, within a clear set of principles centred on the school's Christian vision, ably translating local, national and Diocesan policy into the school's context.
6. Communicate compellingly the school's vision and drive the strategic leadership, empowering all pupils and staff to excel.

Domain Two: Pupils and staff.

Within the school's Christian ethos, the headteacher will:

1. Demand ambitious standards of achievement and attendance for all pupils, overcoming disadvantage and advancing equality, instilling a strong sense of accountability in staff for the impact of their work on pupils' outcomes.
2. Secure excellent teaching through an analytical understanding of how pupils learn and of the core features of successful classroom

practice and curriculum design, leading to rich curriculum opportunities and pupils' well-being, taking full account of the school's Church of England foundation.

3. Establish an educational culture of "open classrooms" as a basis for sharing best practice within and between schools, drawing on and conducting relevant research and robust data analysis.

4. Create an ethos based on Christian values within which all staff are motivated and supported to develop their own skills and subject knowledge, and to support each other.

5. Identify emerging talents, coaching current and aspiring leaders in a climate where excellence is the standard, leading to clear succession planning

Hold all staff to account for their professional conduct and practice

Domain Three: Systems and process.

In a Church school, the relationship between the mission statement and the provision of effective governance, organisation and management should reflect the school's Christian aims. In order to provide an efficient, effective and safe Christian learning environment, the headteacher will:

1. Ensure that the school's systems, organisation and processes are well considered, efficient and fit for purpose, upholding the principles of transparency, integrity and probity within a Christian context.
2. Within the school's Christian ethos, provide a safe, calm and well-ordered environment for all pupils and staff, focused on safeguarding pupils and developing their exemplary behaviour in school and in the wider society.
3. Establish rigorous, fair and transparent systems and measures for managing the performance of all staff, addressing any under-performance, supporting staff to improve and valuing excellent practice.
4. Welcome strong governance and actively support the governing body to understand its role and deliver its functions effectively – in particular its functions to set school strategy and hold the headteacher to account for pupil, staff and financial performance.
5. Exercise strategic, curriculum-led financial planning to ensure the equitable deployment of budgets and resources, in the best interests of pupils' achievements, the school's sustainability and its Christian character.

6. Distribute leadership throughout the organisation, forging teams of colleagues who have distinct roles and responsibilities and hold each other to account for their decision making.

Domain Four: The self-improving school system

Working in a spirit of collaboration to secure Christian principles of equity and entitlement, the headteacher will:

1. Create an outward-facing school which works with other schools, organisations and the local community– in a climate of mutual challenge – to champion best practice and secure excellent achievements for all pupils.
2. Develop effective relationships with fellow professionals, colleagues in other public services, parents/carers and the Church community to improve academic and social outcomes for all pupils.
3. Challenge educational orthodoxies in the best interests of achieving excellence, harnessing the findings of well evidenced research to frame self-regulating and self-improving schools.
4. Shape the current and future quality of the teaching profession through high quality training and sustained professional development of all staff.
5. Within the school’s Christian ethos, model entrepreneurial and innovative approaches to school improvement, leadership and governance, confident of the vital contribution of internal and external accountability.
6. Inspire and influence others- within and beyond schools- to believe in the fundamental importance of education in young people's lives and to promote the value of education especially within a Christian context.

The applicant will be required to safeguard and promote the welfare of children and young people. The Headteacher is expected to demonstrate this commitment to safeguarding and promoting the welfare of children and young people and is expected to hold all staff and volunteers

This job description forms part of the contract of employment of the person appointed to the post. It reflects the position at the present time only and may be reviewed in negotiation with the employee in the future. The appointment is subject to the current conditions of employment in the School Teachers’ Pay and Conditions Document as they relate to headteachers.

ANNEX 1A DEPUTY HEADTEACHER JOB DESCRIPTION

Voluntary Aided Schools/Foundation Schools/Academies

This appointment is with the governing body of the school under the terms of the National Society contract signed with the governors as employers. It is subject to the current conditions of employment of deputy headteachers, contained in the School Teachers' Pay and Conditions document, other current educational and employment legislation, relevant Teacher Standards (2011) and National Standards of Excellence for Headteachers (2015), and the school's Articles of Government.

JOB TITLE: Deputy headteacher

ACCOUNTABLE TO: The headteacher

MAIN PURPOSE: To work with the headteacher in creating, inspiring and embodying the Christian ethos and culture of this Church school, securing its Mission Statement with all members of the school community and ensuring an environment for teaching and learning that empowers both staff and students to achieve their highest potential.

To this end the deputy headteacher will:

- Undertake the normal responsibilities of the class teacher
- Be an active participant of the senior management/leadership team
- Assist the headteacher in the strategic leadership and management of the school
- Assist the headteacher in the day to day organisation and management of the school
- Support and/or represent the headteacher at meetings as and when required
- If the headteacher is absent from the school a deputy headteacher must undertake their professional duties to the extent required by the headteacher or the relevant body or, in the case of a foundation, voluntary aided or foundation special school, the governing body.
- Undertake such duties as are delegated by the headteacher
- Play a major role, under the overall direction of the headteacher, in formulating and reviewing the Development Plan, aims and objectives of the school by:
 - (a) formulating the aims and objectives of the school;
 - (b) establishing the policies through which they are to be achieved;
 - (c) managing staff and resources to that end;
 - (d) Monitoring progress towards their achievement.

MAIN TASKS:

The specific nature and balance of these responsibilities will vary according to the needs of the school and may, in larger schools with more than one deputy, be shared. It will be necessary to specify the leadership, management, curriculum and subject/aspect co-ordination responsibilities/teaching commitment to be undertaken by the postholder.

1. Teaching and Learning responsibilities

- 1.1 To carry out the duties of a school teacher as set out in the current School Teachers' Pay and Conditions Document.
- 1.2 To carry out the duties of a general class teacher as detailed in the school's class teacher job description, including the provision of cover for absent teachers.
- 1.3 To be responsible for a specific class or age group of children to be decided on appointment.
- 1.4 To demand and demonstrate ambitious standards of achievement and attendance for all pupils, overcoming disadvantage and advancing equality, instilling a strong sense of accountability in staff for the impact of their work on pupils' outcomes.
- 1.5 Demonstrate consistently excellent teaching through an analytical understanding of how pupils learn and of the core features of successful classroom practice and curriculum design, leading to rich curriculum opportunities and pupils' well-being

2. The internal organisation, management and control of the school

- 2.1 To have specific responsibilities (e.g. for aspects of school management or the curriculum) to be agreed upon appointment.
- 2.2 To contribute to:
 - Maintaining and developing the Christian ethos, values and overall purposes of the school
 - Formulating the aims and objectives of the school and policies for their implementation
 - A development plan which will translate school aims and policies into actions
 - Monitoring and evaluating the performance of the school
 - Implementing the Authority's and the governing body's policies on equal opportunity issues for all staff and pupils in relation to sex, gender, race, disability and special needs
 - The efficient organisation, management and supervision of school routines
- 2.3 To assist in creating a Christian ethos within which all staff are motivated and supported to develop their own skills and subject knowledge, and to support each other.

3. Curriculum Development

- 3.1 To assist in, and to lead when appropriate or when requested to:
- The development, organisation and implementation of the school's curriculum
 - School policies on curriculum, teaching and learning styles, assessment, recording and reporting
 - Ensuring that the learning and teaching provided by different departments and teaching teams form a co-ordinated, coherent curriculum entitlement for individuals
 - Ensuring that information on pupil progress is used to improve teaching and learning to inform and motivate pupils, to inform parents, to provide necessary references for other educational institutions and employers, and to aid governors in their future management of the school
 - Ensuring that the individual pupil's continuity of learning and effective progression of achievement are provided
 - The promotion of extra-curricular activities in accordance with the educational aims of the school

4. Pupil care

- 4.1 To contribute to:
- The development, organisation and implementation of the school's policy for the personal and social development of pupils within a Christian context including pastoral care and guidance
 - The effective induction of pupils
 - The determination of appropriate pupil groupings
 - The promotion among pupils of standards of conduct/discipline and a proper regard for authority and the encouragement of good behaviour within a Christian context
 - The development among pupils of self-discipline
 - The handling of individual disciplinary cases
- 4.2 Develop effective relationships with fellow professionals, colleagues in other public services, parents/carers to improve academic and social outcomes for all pupils.
- 4.3 Provide a safe, calm and well-ordered environment for all pupils and staff, focused on safeguarding pupils and developing their exemplary behaviour in school and in the wider society

5. The management of staff

- 5.1 To participate in the recruitment and deployment of teaching and non-teaching staff of the school
- 5.2 To actively contribute to good management practice by ensuring positive staff participation, effective communication and procedures

- 5.3 To participate in arrangements made in accordance with the regulations for the appraisal of the performance of staff in school
- 5.4 To implement and develop staff development policies in relation to:
- The induction of new and newly qualified teachers and other staff into a Church school
 - The provision of professional advice and support and the identification of training needs
 - Students under training/work experience
- 5.5 To demonstrate effective leadership, representation and liaison both within the school and other interested or involved persons or bodies.
- 5.6 To maintain good relationships with individuals, groups and staff unions and associations.

6 The management of resources

- 6.1 To contribute to the formulation of the school's policies and procedures concerning resource management
- 6.2 To allocate, control and account for those financial and material resources of the school which are delegated by the headteacher.
- 6.3 To promote a whole school environment which stimulates learning and enhances the appearance of the school.
- 6.4 To participate in the arrangements for the security and effective supervision of the school buildings, their contents and grounds, including aspects of health and safety.
- 6.5 To maintain effective working relationships with external agencies and services contracted to the school and the Authority.

7 Relationships

- 7.1 To advise and support the governing body as required in the exercising of its functions including attending meetings and making reports.
- 7.2 To assist with the liaison with and co-operation with Authority / Diocesan officers and support services.
- 7.3 To promote and develop effective communications and links with parents and to provide positive responses to concerns and problems regarding their children's education.
- 7.4 To assist in liaison with other educational establishments in order to promote the continuity of learning, progression of achievement and curriculum development.

- 7.5 To help to promote a vision of a Church school witnessing to its Christian values in its local community
- 7.6 To assist in liaison with the Church, other professional bodies, agencies and services.
- 7.7 To develop and maintain positive links and relationships with the community, local organisations and employers:
- To promote a positive image of the school
 - To ensure that the school plays a constructive role in the life of the community and that its curriculum draws on the nature and resources of that community.
- 7.7 Create outward-facing schools which work with other schools, organisations and the local community– in a climate of mutual challenge – to champion best practice and secure excellent achievements for all pupils.

The applicant will be required to safeguard and promote the welfare of children and young people. The deputy headteacher is expected to demonstrate this commitment to safeguarding and promoting the welfare of children and young people and to support the headteacher in holding all staff and volunteers accountable for their contribution to the safeguarding regulations.

This job description forms part of the contract of employment of the person appointed to the post. It reflects the position at the present time only and may be reviewed in negotiation with the employee in the future. The appointment is subject to the current conditions of employment in the School Teachers' Pay and Conditions Document as they relate to deputy headteachers.

ANNEX 2 PERSON SPECIFICATION/SELECTION

CRITERIA FOR HEADTEACHER IN XXX VOLUNTARY AIDED SCHOOL/FOUNDATION SCHOOL/ACADEMY

NB: This is a master outline for a person specification; this should be personalised to the school. It is not expected that all the suggestions are included only those relevant to the post and the wording/vocabulary can also be altered to suit the school's needs. Italic text indicates guidance notes that should be deleted. Bold text indicates criteria strongly recommended.

The applicant will be required to safeguard and promote the welfare of children and young people and be faithful to the trust deed.

Note: Candidates failing to meet any of the essential criteria will automatically be excluded

[A] Faith Commitment

	Essential	Desirable	Source
Full and active member of a church in membership of Churches Together in England. (This requires evidence of current church involvement and a clear indication of the applicant's beliefs in relation to a Church school).	E		

To be able to demonstrate their knowledge and understanding of the following in the context of a Church school.

	Essential	Desirable	Source
Leading school worship			
Ways of developing religious education and worship			
A commitment to strategic thinking and planning that builds, communicates and carries forward a coherent and shared vision for the Christian ethos of the school.			
How relationships should be fostered and developed between the school, local Church and its community and Diocese of xxxxx			

[B] Qualifications

	Essential	Desirable	Source
Qualified teacher status	E		
Degree			

[C] Professional Development

	Essential	Desirable	Source
Evidence of appropriate professional development for the role of deputy headteacher			
Evidence of recent leadership and management professional development			

Has successfully undertaken appropriate Child Protection training/ Designated Senior Person training			
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[D] School leadership and management experience

	Essential	Desirable	Source
Recent successful leadership as a Headteacher.			
Recent successful leadership as a deputy Headteacher or assistant Headteacher.			
Be able to demonstrate successful/effective leadership in a school in a similar community/facing similar challenges			
To have taken an active involvement in school self evaluation and development planning.			
An awareness of the/previous involvement in/active involvement in/fully conversant with financial management of a primary school.			
Knowledge and understanding of strategic financial planning and budgetary management in relation to their contribution to school development and pupil achievement.			
To have had responsibility for policy development and implementation			
To have had experience of and ability to contribute to staff development across the primary range. (E.g. coaching, mentoring, INSET for staff).			

[E] Experience and knowledge of teaching

	Essential	Desirable	Source
Experience of teaching in more than one school			
Experience of teaching in a school in similar circumstances/ serving a similar community.			
To have taught in at least 2 Key Stages/ taught both KS 2 and EYFS/KS1/ taught across KS2/ taught KS1 or KS2 or EYFS.			
Significant teaching experience within the primary phase			
To have a knowledge and understanding of all 3 Key Stages in the primary phase			
To be able to effectively use data, assessment and target setting to raise standards/address weaknesses			
To be able to exemplify how the needs of all pupils (SEN, AEN, AGT, EAL, GRT) have been met through high quality teaching.			

[F] Professional Attributes

	Essential	Desirable	Source
Demonstrate an understanding, awareness and empathy for the needs of the pupils at xxx School and how these could be met.			

Able to demonstrate a clear rationale for behaviour management and a proven track record of the effective implementation of a range of behaviour management strategies.			
Excellent written and oral communication skills (which will be assessed at all stages of the process).			
To be a leader of learning demonstrating, promoting and encouraging outstanding classroom practice.			
Show a good commitment to sustained attendance at work	E		

[G] Professional Skills

(Based on the National Standards of Excellence for Headteachers 2015)

A deputy headteacher is expected to be working within and towards the National Standards of Headship

The appointing panel should select maybe 2 or 3 standards from some or all of the domains. Ensuring that there is no duplication with other selection criteria. It is also possible to delete some parts of the standards/phrases/words to draw attention to the key aspects for your school.

Qualities and Knowledge		Essential	Desirable	Source
1	Hold and articulate clear values and moral purpose focused on providing a world-class education for the pupils at xxx reflecting the Church foundation of the school.			
2	Demonstrate optimistic personal behaviour, positive relationships and attitudes towards their pupils and staff, and towards parents, governors and members of the local Church and wider community.			
3	Lead by example – with integrity, creativity, resilience, and clarity – drawing on their own scholarship, expertise and skills, and that of those around them.			
4	Sustain wide, current knowledge and understanding of education and school systems locally, nationally and globally, and pursue continuous professional development, that reflects the needs of a Church of England/'Methodist school.			
5	Work with political and financial astuteness, within a clear set of principles centred on the school's Christian vision, ably translating local and national policy into the school's context.			
6	Communicate compellingly the school's vision and drive the strategic leadership, empowering all pupils and staff to excel.			

Pupils and Staff		Essential	Desirable	Source
1	Demand ambitious standards for all pupils, overcoming disadvantage and advancing equality,			

	instilling a strong sense of accountability in staff for the impact of their work on pupils' outcomes.			
2	Secure excellent teaching through an analytical understanding of how pupils learn and of the core features of successful classroom practice and curriculum design, leading to rich curriculum opportunities and pupils' well-being taking full account of the school's Church of England/Methodist foundation.			
3	Establish an educational culture of "open classrooms" as a basis for sharing best practice within and between schools, drawing on and conducting relevant research and robust data analysis.			
4	Create an ethos based on Christian values within which all staff are motivated and supported to develop their own skills and subject knowledge, and to support each other.			
5	Identify emerging talents, coaching current and aspiring leaders in a climate where excellence is the standard, leading to clear succession planning			
6	Hold all staff to account for their professional conduct and practice			

Systems and Process		Essential	Desirable	Source
1	Ensure that the school's systems, organisation and processes are well considered, efficient and fit for purpose, upholding the principles of transparency, integrity and probity, within a Christian context.			
2	Within the school's Christian ethos, provide a safe, calm and well-ordered environment for all pupils and staff, focused on safeguarding pupils and developing their exemplary behaviour in school and in the wider society.			
3	Establish rigorous, fair and transparent systems and measures for managing the performance of all staff, addressing any under-performance, supporting staff to improve and valuing excellent practice.			
4	Welcome strong governance and actively support the governing body to understand its role and deliver its functions effectively – in particular its functions to set school strategy and hold the headteacher to account for pupil, staff and financial performance.			
5	Exercise strategic, curriculum-led financial planning to ensure the equitable deployment of budgets and resources, in the best interests of pupils' achievements, the school's sustainability, and its Christian character.			
6	Distribute leadership throughout the organisation, forging teams of colleagues who have distinct roles and responsibilities and hold each other to account for their decision making.			

The Self-improving school system		Essential	Desirable	Source
1	Create an outward-facing schools which works with other schools and organisations – in a climate of mutual challenge – to champion best practice and secure excellent achievements for all pupils.			
2	Develop effective relationships with fellow professionals, parents/carers, the Church community and colleagues in other public services to improve academic and social outcomes for all pupils.			
3	Challenge educational orthodoxies in the best interests of achieving excellence, harnessing the findings of well evidenced research to frame self-regulating and self-improving schools.			
4	Shape the current and future quality of the teaching profession through high quality training and sustained professional development of all staff.			
5	Model entrepreneurial and innovative approaches to school improvement, leadership and governance, confident of the vital contribution of internal and external accountability.			
6	Inspire and influence others- within and beyond schools- to believe in the fundamental importance of education in young people's lives and to promote the value of education, especially within a Christian context.			

[H] Personal Qualities

	Essential	Desirable	Source
Continue to promote xxx's strong educational philosophy and values			
Inspire, challenge, motivate and empower teams and individuals to achieve high goals			
Be approachable, person centred.			
Demonstrate personal enthusiasm and commitment to leadership aimed at making a positive difference to children and young people			
Build and maintain quality relationships through interpersonal skills and effective communication			
Demonstrate personal and professional integrity, including modelling values and vision			
Manage and resolve conflict			
Prioritise, plan and organise themselves and others			
Think analytically and creatively and demonstrate initiative in solving problems			
Be aware of their own strengths and areas for development and listen to, and reflect constructively and act upon as appropriate, feedback from others			
Able to empathise appropriately and take necessary steps			
Demonstrate a capacity for sustained hard work with energy and vigour			

Demonstrate impact and presence			
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[I] Confidential References.

Positive and supportive faith reference from the priest/minister where the applicant regularly worships.	E
Candidates who do not use their Parish priest/minister must give an explanation in the letter of application	
Positive recommendation from all referees, including current employer	E

[J] Application Form and Supporting Statement

The form must be fully completed and legible. The supporting statement should be clear, concise and related to the specific post.

ANNEX 2A PERSON SPECIFICATION/SELECTION

CRITERIA FOR DEPUTY HEADTEACHER IN XXX VOLUNTARY AIDED SCHOOL/FOUNDATION SCHOOL/ACADEMY

NB: This is a master outline for a person specification; this should be personalised to the school. It is not expected that all the suggestions are included only those relevant to the post and the wording/vocabulary can also be altered to suit the school's needs. Italic text indicates guidance notes that should be deleted. Bold text indicates criteria strongly recommended.

The applicant will be required to safeguard and promote the welfare of children and young people and be faithful to the trust deed.

Note: Candidates failing to meet any of the essential criteria will automatically be excluded

[A] Faith Commitment

	Essential	Desirable	Source
Full and active member of a church in membership of Churches Together in England. (This requires evidence of current church involvement and a clear indication of the applicant's beliefs in relation to a Church school).	E		

To be able to demonstrate their knowledge and understanding of the following in the context of a Church school.

	Essential	Desirable	Source
Leading school worship			
Ways of developing religious education and worship			
A commitment to strategic thinking and planning that builds, communicates and carries forward a coherent and shared vision for the Christian ethos of the school.			
How relationships should be fostered and developed between the school, local Church and its community and Diocese of xxxxx			

[B] Qualifications

	Essential	Desirable	Source
Qualified teacher status	E		
Degree			

[C] Professional Development

	Essential	Desirable	Source
Evidence of appropriate professional development for the role of deputy headteacher			
Evidence of recent leadership and management professional development			

Has successfully undertaken appropriate Child Protection training/ Designated Senior Person training			
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[D] School leadership and management experience

	Essential	Desirable	Source
Substantial and current experience as a senior leader in a primary school			
Active and effective leadership of a team / key stage/ curriculum area/ department			
Be able to demonstrate successful/effective leadership in a school in a similar community / facing similar challenges			
To have taken an active involvement in school self evaluation and development planning			
To have implemented and developed a whole school initiative			
To have had responsibility for policy development and implementation			
To have had experience of and ability to contribute to staff development across the primary range. (E.g. coaching, mentoring, INSET for staff).			

[E] Experience and knowledge of teaching

	Essential	Desirable	Source
Experience of teaching in more than one school			
Experience of teaching in a school in similar circumstances/ serving a similar community.			
To have taught in at least 2 Key Stages/ taught both KS 2 and EYFS/KS1/ taught across KS2/ taught KS1 or KS2 or EYFS.			
Significant teaching experience within the primary phase			
To have a knowledge and understanding of all 3 Key Stages in the primary phase			
To be able to effectively use data, assessment and target setting to raise standards/address weaknesses			
To be able to exemplify how the needs of all pupils (SEN, AEN, AGT, EAL, GRT) have been met through high quality teaching.			

[F] Professional Attributes

	Essential	Desirable	Source
Demonstrate an understanding, awareness and empathy for the needs of the pupils at xxx School and how these could be met.			
Able to demonstrate a clear rationale for behaviour management and a proven track record of the effective implementation of a range of behaviour management strategies.			
Excellent written and oral communication skills (which will be assessed at all stages of the process).			

To be a leader of learning demonstrating, promoting and encouraging outstanding classroom practice.			
Show a good commitment to sustained attendance at work	E		

[G] Professional Skills

(Based on the National Standards of Excellence for Headteachers 2015)

A deputy headteacher is expected to be working within and towards the National Standards of Headship

The appointing panel should select maybe 2 or 3 standards from some or all of the domains. Ensuring that there is no duplication with other selection criteria. It is also possible to delete some parts of the standards/phrases/words to draw attention to the key aspects for your school.

Qualities and Knowledge		Essential	Desirable	Source
1	Hold and articulate clear values and moral purpose focused on providing a world-class education for the pupils at xxx reflecting the Church foundation of the school.			
2	Demonstrate optimistic personal behaviour, positive relationships and attitudes towards their pupils and staff, and towards parents, governors and members of the local Church and wider community.			
3	Lead by example – with integrity, creativity, resilience, and clarity – drawing on their own scholarship, expertise and skills, and that of those around them.			
4	Sustain wide, current knowledge and understanding of education and school systems locally, nationally and globally, and pursue continuous professional development, that reflects the needs of a Church of England/Methodist school.			
5	Work with political and financial astuteness, within a clear set of principles centred on the school's Christian vision, ably translating local and national policy into the school's context.			
6	Communicate compellingly the school's vision and drive the strategic leadership, empowering all pupils and staff to excel.			

Pupils and Staff		Essential	Desirable	Source
1	Demand ambitious standards for all pupils, overcoming disadvantage and advancing equality, instilling a strong sense of accountability in staff for the impact of their work on pupils' outcomes.			
2	Secure excellent teaching through an analytical understanding of how pupils learn and of the core features of successful classroom practice and curriculum design, leading to rich curriculum opportunities and pupils' well-being, taking full account of the school's Church of England/Methodist foundation.			

3	Establish an educational culture of "open classrooms" as a basis for sharing best practice within and between schools, drawing on and conducting relevant research and robust data analysis.			
4	Create an ethos based on Christian values within which all staff are motivated and supported to develop their own skills and subject knowledge, and to support each other.			
5	Identify emerging talents, coaching current and aspiring leaders in a climate where excellence is the standard, leading to clear succession planning			
6	Hold all staff to account for their professional conduct and practice			

Systems and Process		Essential	Desirable	Source
1	Ensure that the school's systems, organisation and processes are well considered, efficient and fit for purpose, upholding the principles of transparency, integrity and probity, within a Christian context.			
2	Within the school's Christian ethos, provide a safe, calm and well-ordered environment for all pupils and staff, focused on safeguarding pupils and developing their exemplary behaviour in school and in the wider society.			
3	Establish rigorous, fair and transparent systems and measures for managing the performance of all staff, addressing any under-performance, supporting staff to improve and valuing excellent practice.			
4	Welcome strong governance and actively support the governing body to understand its role and deliver its functions effectively – in particular its functions to set school strategy and hold the headteacher to account for pupil, staff and financial performance.			
5	Exercise strategic, curriculum-led financial planning to ensure the equitable deployment of budgets and resources, in the best interests of pupils' achievements, the school's sustainability, and its Christian character.			
6	Distribute leadership throughout the organisation, forging teams of colleagues who have distinct roles and responsibilities and hold each other to account for their decision making.			

The Self-improving school system		Essential	Desirable	Source
1	Create an outward-facing schools which works with other schools and organisations – in a climate of mutual challenge – to champion best practice and secure excellent achievements for all pupils.			
2	Develop effective relationships with fellow professionals, parents/carers, the Church community and colleagues in other public services			

	to improve academic and social outcomes for all pupils.			
3	Challenge educational orthodoxies in the best interests of achieving excellence, harnessing the findings of well evidenced research to frame self-regulating and self-improving schools.			
4	Shape the current and future quality of the teaching profession through high quality training and sustained professional development of all staff.			
5	Model entrepreneurial and innovative approaches to school improvement, leadership and governance, confident of the vital contribution of internal and external accountability.			
6	Inspire and influence others- within and beyond schools- to believe in the fundamental importance of education in young people's lives and to promote the value of education, especially within a Christian context.			

[H] Personal Qualities

	Essential	Desirable	Source
Continue to promote xxx's strong educational philosophy and values			
Inspire, challenge, motivate and empower teams and individuals to achieve high goals			
Be approachable, person centred.			
Demonstrate personal enthusiasm and commitment to leadership aimed at making a positive difference to children and young people			
Build and maintain quality relationships through interpersonal skills and effective communication			
Demonstrate personal and professional integrity, including modelling values and vision			
Manage and resolve conflict			
Prioritise, plan and organise themselves and others			
Think analytically and creatively and demonstrate initiative in solving problems			
Be aware of their own strengths and areas for development and listen to, and reflect constructively and act upon as appropriate, feedback from others			
Able to empathise appropriately and take necessary steps			
Demonstrate a capacity for sustained hard work with energy and vigour			
Demonstrate impact and presence			

[I] Confidential References.

Positive and supportive faith reference from the priest/minister where the applicant regularly worships. Candidates who do not use their Parish priest/minister must give an explanation in the letter of application	E
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Positive recommendation from all referees, including current employer

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[J] Application Form and Supporting Statement

The form must be fully completed and legible. The supporting statement should be clear, concise and related to the specific post.

ANNEX 3 CHURCH MEMBERSHIP CRITERIA

CHURCH OF ENGLAND VOLUNTARY AIDED SCHOOLS, FOUNDATION SCHOOLS AND ACADEMIES (in which the Governing Body is the employer)

The following information offers advice regarding the Church criteria.

The requirement is for a 'full and active member of a Church in membership of Churches Together in England or which at a local level works closely with an Anglican church in this Diocese.

'Full and active' means a regular churchgoer who attends more than once a month, is known to the parish priest / minister and is involved in church activities.

The list of Churches Together in England and its associated bodies can be found on its website: www.cte.org.uk Applications will be checked against the current list.

Guidance for Candidates:

It is essential that the Diocesan application form is used.

You must give a faith referee, as outlined on the application form. The referee should be your present parish priest / minister who is able to verify your own personal commitment to the Christian faith outside of work, and the worship life of your church. If you do not use him/her, you must give an explanation on the application form or in your letter of application.

You are asked in your letter of application to describe how your previous experience and achievements have helped to prepare you for a post in a Church school. You should give a clear statement of:

- Your personal involvement in the life of your church
- Your educational philosophy, its implementation in practice and your commitment to developing the Christian character of the school.

You should address the areas shown in the person specification and job description.

Please include any other information you feel would be helpful. Your letter must be clear and concise with well organised views, addressing the specific post in the specific school.

Other Matters

The National Society Contract of employment will be used. The relevant section of the contract is as follows:

As the Headteacher/[Deputy Headteacher] of a Church of England school, you are required to have regard to the Christian character of the School and its Foundation

and to undertake not to do anything in any way contrary to the interests of the Foundation.

You are required to give and/or supervise the giving of religious education in accordance with the doctrines of the Church of England Church and the Trust Deed of the school.

You are required to take part in and lead acts of religious worship [if required by the headteacher].