Effectively managing headteacher performance – a new service for headteachers and governing bodies

Effective performance management, or appraisal, is a key tool in the school self-evaluation and improvement planning cycle. By setting targets that are aspirational and yet realistic for headteachers, governing bodies can make sure that the work of the school is fully focussed on improving outcomes for all pupils.

There is a statutory duty on the governing body to appoint an extended advisor for the purpose of providing it with advice and support in relation to the appraisal of the headteacher.

Headteachers and governing bodies should consider the impact of their external adviser each year by considering these questions:

- Does your external adviser know your school well and keep fully up to date with changes in school?
- Is your external adviser subject to rigorous training and quality assurance?
- Does your external adviser provide the school with value for money?
- Has your school Ofsted grade improved under the guidance of your external adviser?
- Does your external adviser help governors monitor the headteachers performance throughout the school year?
- Do you have a new headteacher? Is it time for a new external adviser as well?
- Has your external adviser helped set targets that have led to improved outcomes for pupils?

Schools’ Choice is to introduce a new service in September 2015 to help support governing bodies to monitor the progress and effectiveness of the schools’ leadership in bringing about those improved outcomes.

What makes this service different?

This service is based on establishing a strong relationship between an external adviser and the school. The external adviser will monitor school development through headteacher performance at termly monitoring visits. This means the external adviser will be very knowledgeable about the schools context and will be in a strong position to advise governors about school progress.

This service is very comprehensive and designed to promote rapid change and improvement in primary and secondary schools.
Planning headteacher performance management

Headteacher performance management is a crucial role for the Governing Body. Carefully considered targets set for the headteacher should be filtered down into the targets set by the headteacher for all their teaching and non-teaching staff. It is therefore essential that the right targets are set in the first place.

By using a Schools’ Choice approved external adviser you can be assured of a rigorous process that will fully integrate with, and complement, the school improvement planning cycle.

There are three key steps in the Schools’ Choice headteacher performance management offer:

- Appointment of an external adviser
- Setting objectives and targets
- Initiating a programme of review and monitoring.

1. **Choosing an external adviser**
   The government acknowledges that setting and monitoring targets for headteachers can be a difficult process for many governors who do not always have the detailed knowledge of education and school improvement by which to set effective, robust and challenging targets.

   In recognising this challenge, Schools’ Choice is to make available a pool of approved external advisers with the necessary experience and expertise to assist Governing Bodies. Our advisers have been through a rigorous selection process and are ready to support schools in this critical area of performance management.

   By choosing Schools’ Choice you can be assured that your adviser will be challenging and fully focussed on securing good or better learning for all your pupils and with a rolling programme of support you can also be assured that the Governing body will feel supported throughout the entire review and monitoring period.

   Schools’ Choice provides regular updates for all its approved advisers and frequently quality assures their work by conducting visits and reviewing paperwork.

   When you sign up for this programme you will be sent details of all our approved external advisers including a summary of their school improvement experience and areas of expertise. Headteachers and governing bodies can then work together to select the external adviser that best suits the needs of their school.

2. **The Performance Management Day - Setting objectives and targets**
   In preparation for the review day the headteacher will submit a personal self-evaluation to the external adviser. The adviser will also ask for a number of documents to be supplied by the school so they are fully briefed before coming into school.
On the performance management day the external adviser will spend three-quarters of a day in school. The day will be split into four parts:

a) Tour of the school led by the headteacher. The external adviser will provide feedback on this tour and this provides excellent preparation for the new style Ofsted inspections.

b) Pre-review meeting with the headteacher to review their personal self-evaluation

c) Pre-review meeting with Governors to gather their view on the headteacher’s performance

d) Review meeting with headteacher and Governors to formally agree if targets have been met and set SMART targets for the forthcoming academic year

The adviser will work with the Headteacher and Governing Body to agree the objectives and set targets as part of the performance management. These will be Specific, Measurable, Achievable, Relevant and Time related (SMART) and will contribute to:

- Improving the education for all pupils at the school
- The implementation of any plan the Governing Body has to improve the schools’ educational provision and performance.

The external adviser will employ SMART targets and ensure that everyone involved has a shared understanding of what action is involved and so help with the review and monitoring process.

The adviser will formally record the review meeting and produce a monitoring schedule for the year.

3. Initiating a programme of review and monitoring

This aspect of the School’s Choice offer is key to supporting rapid and sustainable improvement in schools.

Each term the external adviser will spend one day helping to review the progress the headteacher, and subsequently the school, is making.

This enables Governors to hold the headteacher to account and enables the headteacher to have time to reflect on their own professional development and the impact of their leadership.

The day is made up of a half-day visit to school and a half-day scrutinising documentary evidence in advance and writing a record of the visit.

Time spent in school will include visits to classrooms looking at pupils’ work and discussions with the headteacher and Governors.
Key benefits of using Schools’ Choice for your headteacher performance management:

- A comprehensive service that provides Governing bodies with the advice and support they need to appraise the performance of their headteacher.
- A monitoring schedule designed for rapid school improvement.
- Governing bodies have a professional evaluation of school and headteacher performance each term.
- External advisers will be challenging and fully focussed on securing good or better learning for all your pupils.
- External advisers fully up-to-date with current requirements for schools.
- External advisers have up to date knowledge of what other service provision is available so headteacher professional development can be integrated into the performance management process. By linking performance management into the headteachers evaluation and improvement planning means that all actions taken by school leaders are linked to the same purpose.

Key Stages

The cost: £1650
This programme is provided as a package and includes the following work by the external adviser:
**Autumn term:**

**Planning and preparation**
Half a day reviewing and scrutinising key documentation including: headteacher self-evaluation, school self-evaluation, school improvement plan, nationally published data for end of key stage results, year-group progress data.

**The Performance Management Day**
Three-quarters of a day spent in school (4 hours minimum) including: headteacher led tour of the school, headteacher personal self-evaluation meeting, Governor meeting to review headteachers’ progress, formal target setting meeting.

**Formal recording**
A quarter of a day writing up the review, targets and headteacher performance monitoring cycle for the forthcoming academic year.

**Spring term:**

**Visit to school**
Half a day (three hours) spent in school visiting classrooms, meeting with the headteacher and Governors separately and then together.

**Planning preparation and recording**
Half a day (combined) on reviewing updated school data and evaluation documents and writing up the monitoring visit.

**Summer term:**

**Visit to school**
Half a day (three hours) spent in school visiting classrooms, meeting with the headteacher and Governors separately and then together.

**Planning preparation and recording**
Half a day (combined) on reviewing updated school data and evaluation documents and writing up the monitoring visit.

**Next steps**
If you’d like to find out more about how we can work with you please contact the Schools’ Choice team. We will listen to your needs and tailor a service to meet your requirements. **T:** 0300 123 1420
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