



Appointing a MIST Head - a developing memo (AUG 2015)

The aim of this memo is to give confidence to a MIST governing body and guide them when they are faced with appointing a new Head. It builds on assumptions like these:

- *appointing a new school Head is probably the most important decision a governing body is responsible for;*
- *the governors will employ the Head;*
- *this memo must on the whole have the character of guidance rather than prescription, in general setting out options for governors to consider; but there will be some non- negotiable issues which must be clearly identified as such;*
- *MIST has an interest in the process and the outcome: this interest needs to be carefully spelled out so that there is no sense of threat to local governors but rather a welcome for partnership with MIST;*
- *the MIST General Secretary is the principal interpreter of this memo to local governors and is to be perceived by the governors as someone with a bank of knowledge and experience in these processes; he needs to be received as a 'critical friend' to the Chair of Governors in particular and also to the whole governing body as they deliberate and decide.*
- *Where a school employs a HR professional, that person will naturally be consulted for advice and practical support. It is imperative that there is early consultation between the school's HR professional and the MIST General Secretary, so that consistent messages and guidance are given to the Chair of Governors and the Governing Body.*

1 A serving Head **must** indicate at the earliest opportunity to their Chair of Governors the date on which they intend to retire or to resign as Head of the school.

2 It is crucial that the Chair and Head rehearse together the complex issues that will affect their relationship with respect to the process of appointing a new Head. For example:

- there will typically be up to two terms notice to be served, in which the full responsibilities of the Head remain unchanged and the working relationship between Head and governors is unchanged; however,
- while the Chair will naturally turn to the Head (and Bursar or equivalent) both to access administrative support for the appointing process and to harvest from their accumulated experience a considered reflection on what would be in the best interests of the school in the next phase of its development: **but** the Head **must** play no part in influencing the governors as to the profile the next Head of the school;
- the Head remains the 'public face' of the school and is expected loyally and comprehensively to represent the school and its governors, for example, to prospective candidates for headship, and to be open with short-listed candidates to their need for access to the school accommodation for the Head within agreed parameters.



3 The Chair of governors **must** carry full responsibility for responding to a vacancy as quickly as possible, remembering that in this situation time is of the essence; but must be assured that there need be no sense of undue haste (which can lead to poor decision-making). Governors must be briefed as a body and advice should normally be sought at the earliest opportunity from the MIST General Secretary.

4 The first task is to agree with the retiring/resigning Head and the governors an appropriate announcement to staff and parents that will honour what has been achieved, acknowledge change but above all give confidence that the governors (assisted by MIST) will identify excellent leadership for the school in the future.

5 Thereafter the highest priority is to draft the Candidate Pack.

Copies of previous packs for earlier vacancies at other MIST schools can be made available from the General Secretary.

However the Pack is drafted locally, the outcome should be circulated to all Governors for comment. At the heart of the Governors' reflections should be the question: 'What essentially are we looking for in the next Head of this school, knowing (as we do) where the school is now and where we (the Governors) want it to be in 5 or 10 years' time?'

The Candidate Pack typically includes a brief profile of the school and its educational achievements, something of its history and distinctive character; maybe a hint of future development plans; brief information about school finances; something about the governing body; and reference to the school's wider links into the community, locally and globally.

At the core of everything **must** be clarity about the Christian/Methodist identity and ethos of the school. It is natural to include the MIST Ethos Statement in the Candidate Pack, or to provide a link where it can be accessed on the web.

The practical outworking of the Ethos Statement should be emphasised (e.g. each child as a unique individual with extraordinary gifts to be developed; the importance of pastoral care; reference to the Chaplain and the Chaplain's relationship with the Head; the significance attached to the school's worship and high-quality RE).

Reference should be made to MIST and the relationship between the school, MIST and the Methodist Church; and the opportunities offered by MIST (e.g. the termly Heads' Meeting and the annual conference) for nurturing a sense of each Head and each school being part of a mutually supportive group.

Mention should be made to the ongoing development of relationships regionally with Methodist and Methodist/Anglican maintained primary schools and academies and with maintained schools, academies and free schools locally.



Alongside the general information the Pack will include a job description and a person specification; the appropriate salary range and the terms and conditions applicable to the post; together with an outline of the timetable for the appointing process.

The school's staff application form needs to be reviewed to check it meets contemporary requirements and needs. Three distinctive features are to be built into the application form:

i) The following wording **is to be included**:

It is a requirement for this post that the appointee be either a member of a Methodist Church, or an active participant in the worshipping life of another Christian Church and in sympathy with the purposes of the Methodist Church. This is a genuine occupational requirement and the post is excepted under the provisions of schedule 9 of the Equality Act 2010. Subject to this exception, it is the Methodist Schools' policy to employ the best qualified personnel and provide equal opportunity for the advancement of employees including promotion and training, and not to discriminate against any person because of race, colour, national origin, sexual orientation, belief, marital status, disability or age.

A pastoral reflection

The Methodist Church has never been a rigidly doctrinal Church; it has majored on discerning the Spirit of God at work in the lives of honest, open and trusting people of goodwill. Such 'spirituality' is evident in a huge variety of personal journeys, influenced by a large range of Christian denominational traditions. Nor has the Church in recent generations overstated a reliance on 'membership' (in the formal sense) as such. It recognises gladly that in the modern world, people of integrity relate to the Church's worship and shared actions in the community in a variety of ways, ranging from deep devotion to spasmodic searching for meaning and value within the Church's ambit.

It would therefore be characteristic of a Methodist stance to be generous in interpreting our formal requirement for Headship and Christian allegiance. Certainly we want a Head to be serious in honouring our Ethos Statement. We want a Head who is willing to lead with conviction and by personal example on this core characteristic of our schools. We expect a Head to have something constructive and positive to contribute to the outworking of our ethos and values in the school (e.g occasionally leading worship and addressing the school on Christian values), and to be sensitive to the needs of children from other faith traditions and none. But we are not narrowly prescriptive about how a Head will articulate their personal faith and spirituality or describe what has contributed to or currently influences their personal formation.

ii) A request is to be made for 3 referees to be identified, one of whom shall be able authoritatively to write about the candidate's current Christian allegiance.

iii) The salary and pension arrangements, and the terms and conditions of service, are to be within the guidelines issued from time to time by MIST.

The draft Candidate Pack **should** be forwarded to the General Secretary for comment.



6 The small Appointing Panel shall be chaired and led by the Chair of Governors. The Panel shall be constituted of members appointed by and from among local governors together with members appointed by MIST on the nomination of the General Secretary (in consultation with the Chair of MIST). Typically, the Panel *in toto* shall be not less than 5 and not more than 8, of which the numbers appointed by MIST will be between 2 and 4 (one of whom shall normally be the General Secretary).

It is important that there is careful negotiation between the Chair of Governors and the General Secretary in order to produce a balanced Panel, i.e. it is to include women and men, and wherever possible a representative or representatives of ethnic minorities; and a suitable range of experience, skills and perspectives to contribute to all aspects of the exploration of the suitability of candidates.

Governors **must** understand that the Appointing Panel alone is authorised to identify and appoint the next Head of the School (or report to the Governors that no candidate emerged in which the Panel had sufficient confidence to appoint).

7 There is no perfect process by which to reach a short-list of appointable candidates. In consultation with the General Secretary, local governors must agree a process with which they feel confident. Its primary areas of consideration are:

- Are we to use an external consultant (a headhunter); or are we to run our own process of advertising, long-listing and short-listing? And if we are to consider a headhunter, where do we turn for advice and experience? And how do we judge that the costs are manageable and ‘value for money’?
- Whatever method is used, are there preferred places for advertising? (Whatever answers emerge to this question, the search for a new Head **must** always be brought to the attention of all Methodist independent schools; and will appear on the MIST website).
- Are we to use any form of psychometric testing or similar screening process, and where do we turn for expertise on these matters?
- What sort of interview questions are appropriate for long-listed candidates?
- What sort of processes of testing and interview are appropriate for short-listed candidates, typically over a two-day period? And how do we ensure that a cross-section of pupils, staff and all school governors are able in appropriate ways to encounter and assess short-listed candidates, with their perspectives fed to the Appointing Panel?

The General Secretary will build up a body of knowledge, wisdom and resources on the totality of the appointing process that may be mined when a school must appoint a Head.



8 It is the duty of the school governors, the Appointing Panel, the General Secretary and all others involved in the process to adhere to certain principles. They include:

- current 'best practice' in recruitment for employment; respect for confidentiality;
- safeguarding/safer recruiting;
- fairness in the treatment of all candidates (and special sensitivity to issues raised if a current member of the school's staff is a candidate);
- transparency in process and communications;
- adherence to the MIST ethos (e.g. in the style of relating and questioning candidates; and in enveloping the whole process in prayer).

9 Short-list interviews are to be held at the school; and normally it may be helpful for long-list interviews also to be held at the school.

Alongside the long-list and short-list interviews, opportunities are to be provided for candidates to meet relevant stakeholders in the school. Appointing a Head is a two-way process, in which candidates are assessing the school while their own suitability as the prospective Head is being evaluated by the Panel.

The several opportunities for candidates to meet stakeholders are also occasions through which the latter are consulted by the Panel. Candidates will typically meet members of the school's Senior Leadership Team, the Bursar, the Chaplain and some senior students. Governors* who are not members of the Appointing Panel will be offered an informal social occasion to meet short-listed candidates; and may also be invited to listen to candidates' formal presentations of their vision for the future direction of the school.

*It is essential for Governors to ensure that, say, up to 3 of their number have no involvement in any part of the procedure, even informally. If there should be an appeal against any decision of the Appointing Panel, it can then be heard by these unbiased Governors.

All who are consulted will be given opportunity, usually by a co-ordinating person from among their number, to feed their reflections to the Appointing Panel.

10 When an appointment has been made, all necessary document checks concluded and references/referees verified, an announcement is to be made to the governors as a whole, the school, parents and (through the General Secretary) to MIST.

11 Governors need a 'Plan B' if, e.g., a recruiting process does not result in an appointment being made; or if there is a gap in Headship before an appointee can start. This often entails consideration of a Deputy Head acting up as Head to ensure continuity in an interim period.

12 The efficient administration of the total process of appointing Head is the responsibility of the school, or of a consultant contracted by the school.



13 The costs of the process, including travel and overnight hospitality costs for candidates and MIST members of the appointing panel, are to be met by the school.

14 A formal letter of appointment **must** be issued and a contract signed as soon as convenient after the appointment has been made. The General Secretary will provide a standard, up-to- date contract which is used for all MIST Heads.

15 The Chair of Governors, in consultation with the current Head, is responsible for facilitating opportunities for the successful applicant to visit the school and consult widely with senior staff and governors prior to taking up their role; and in due course for preparing the Head's house for its new incumbent and family.

16 The formal induction of the new Head is a responsibility to be shared between the Chair of Governors and MIST (through the General Secretary).

It is the responsibility of the General Secretary to review this document after each new Head is appointed and, if necessary, to propose revisions.