

GUIDANCE NOTES FOR BOOKING AN EXTERNAL ADVISER - 2017

External Adviser Booking Request Form

School/Academy details - please fill this section in full.

Named contact for external adviser visit - the external adviser will contact this person, to schedule the date of visit and assist with any administrative requirements of the visit. If the address of the person is different from the school/academy address, this should be noted.

Visits cannot be arranged without the Birmingham Catholic Primary Partnership Office receiving an External Adviser Booking Request Form from the school/academy.

Selection of external adviser - you may:

(A) Select an external adviser from the list given on the booking request form

(B) Ask the Birmingham Catholic Primary Partnership Office to allocate an external adviser

Return the external adviser booking form to:

**Paul Walmsley
Birmingham Catholic Primary Partnership Office
c/o Newman University
Genners Lane
Bartley Green
Birmingham
B32 3NT**

External Adviser Selection

Once we know your preference of external adviser, we will contact that person, who will in turn, get in touch with the school/academy named contact directly. These two will then schedule the visit and make arrangements for the contextual school/academy information form to be sent directly to the adviser.

Preparation for the adviser visit

In order to make the visit as effective as possible, the adviser will need to analyse **the contextual information** beforehand. He or she will then be able to provide preliminary advice both on the headteacher/principal's progress towards the achievement of 2016-2017 objectives, and suggest possible areas for the 2017-2018 objectives.

The suggested list of documentation is given on the Step-by-Step Guide to Headteacher/Principal's Performance Management. You are welcome to submit additional relevant information. However, please bear in mind that the adviser is only contracted to spend a maximum of three hours preparation time before the visit, and will need to focus on the key documentation during this time.

Once the adviser has reviewed the documentation, he or she will send the nominated contact a written record of preliminary advice. **We would ask that this be circulated to all those involved in the process before the meetings.**

During the visit

The headteacher/principal is encouraged to have a pre-review meeting with the adviser in order to clarify any information and raise queries from the preliminary advice. The appointed governors are also encouraged to have a pre-review meeting with the adviser to follow up issues from the preliminary advice, or seek guidance on particular aspects of the process.

It is the responsibility of those present in the formal review meeting to review the performance of the headteacher/principal, including performance against the objectives set for 2016-2017, and to agree objectives for 2017-2018.

Some objectives set for 2016-2017 may have elements that are planned to continue into 2017-2018. In these cases it should be possible to review the progress made to date and re-programme the remaining intentions as 2017-2018 objectives.

The actual sequence of meetings in your particular school/academy is for the appointed governors and headteacher/principal to decide. Advisers can be used in different ways to support your needs in the performance management of the headteacher/principal.

In all cases the role of the adviser is only to give advice. The responsibility for agreeing objectives with the headteacher/principal and for reviewing headteacher/principal's performance lies with the appointed governors. The adviser will offer to produce a draft statement of objectives following the formal review meeting.

After the visit

If, at the end of the visit, the appointed governors feel that more time with the adviser would be beneficial, then they have the option to purchase more adviser time at a date convenient to them.