

# Executive leader appraisal

## Introduction

Boards have a responsibility to ensure an ethos of high expectations in their organisation. Strong performance management is one element that is essential to support this. The performance of your executive leader is fundamental to your organisation's success.

Boards review the performance of the organisation's executive leader (principal, CEO, headteacher) through a small committee, supported by an educational expert. Our consultant supports you through the whole appraisal process, adding value by exploring context, the organisation's vision and strategy and gathering a holistic objective view of the organisation's performance and the executive's role in leading the organisation. We also recommend adding our executive 360-review service to better understand how your executive leader is perceived in their role.

## Our service

The executive performance management service includes the following elements.

Step	Description
1. Preparation	<p>Our consultant spends time ahead of appraisal meeting to understand the organisation's context, vision and strategy and the objectives set for the executive for the previous year. A briefing phone call is arranged with the chair of the performance management committee to discuss these and request key documents.</p> <p>If you would also like to implement our 360-degree feedback for your executive leader the themes and respondents for this will be agreed at this point.</p>
2. 360-degree feedback (optional)	<p>Respondents and themes are agreed. Our consultant works with the chair to provide guidance to respondents. Our consultant will gather and analyse feedback received and prepare a summary for the appraisal meetings.</p>
3. Appraisal meetings	<p>On the day of the executive's appraisal our consultant will facilitate the following meetings:</p> <ul style="list-style-type: none"> <li><b>i. Meeting with the executive leader (1 hour)</b> To discuss with the executive their view of their performance for the previous year, and their thoughts on their targets for the coming year, including one professional development target.</li> <li><b>ii. Meeting with the executive performance management committee (1 hour)</b> To discuss their views on the executive's performance, any 360-degree feedback and guide them on considerations when setting the executive's targets for the coming year and the pay award decision.</li> <li><b>iii. A joint meeting between the executive and the committee (45 minutes)</b> Facilitated by the consultant, this meeting will provide the executive with the</li> </ul>

	appraisal and 360 feedback (if used) and agree the executive's objectives for the coming year. The feedback should reflect the context of the organisation, its strategy and the expectations of the executive leader's role (referencing national standards).
4. Written report	Written evidence is provided of the appraisal and the agreed performance management objectives (SMART) set for the coming year and the recommended pay award (if relevant).

## Timing

The annual appraisal meeting should take place as soon as possible after the beginning of the autumn term. This enables the results of end of year tests and exams to provide evidence of educational performance; it also means that it is early enough in the year for executive leader to use their objectives to inform the objectives being set for other staff, as well as to plan CPD for themselves and their staff. It also gives everyone three full terms to fulfil their objectives.

## Determining pay

NGA consultants will not advise on individual pay recommendations, but will advise on the organisation's pay policy and other available guidance regarding pay scales, pay advancement and the link to agreed performance objectives. NGA consultants will attend appeals on request and on agreed terms.

## The mid-year review

The board is encouraged to set a date for the mid-year review at the appraisal meeting so that when the spring term comes round it does not get overlooked. NGA can support the mid-year review if requested and on agreed terms.

## Our impact

Reassurance that your executive's appraisal is completed in a fair and professional and thorough manner, setting SMART objectives for your executive that support the development of your organisation. Most clients are so pleased with our service, they book us again for the following year.

## Our fee

Our fee is £899 for members or £950 non-members for our basic service, plus £449 for members or £475 for non-members to add our bespoke 360-degree executive review. NGA fees are inclusive and cover the consultant's travel, incidental expenses and materials. Please note NGA's [terms and conditions](#) which include details of our cancellation policy.

To book a consultant please contact [consultancy@nga.org.uk](mailto:consultancy@nga.org.uk)