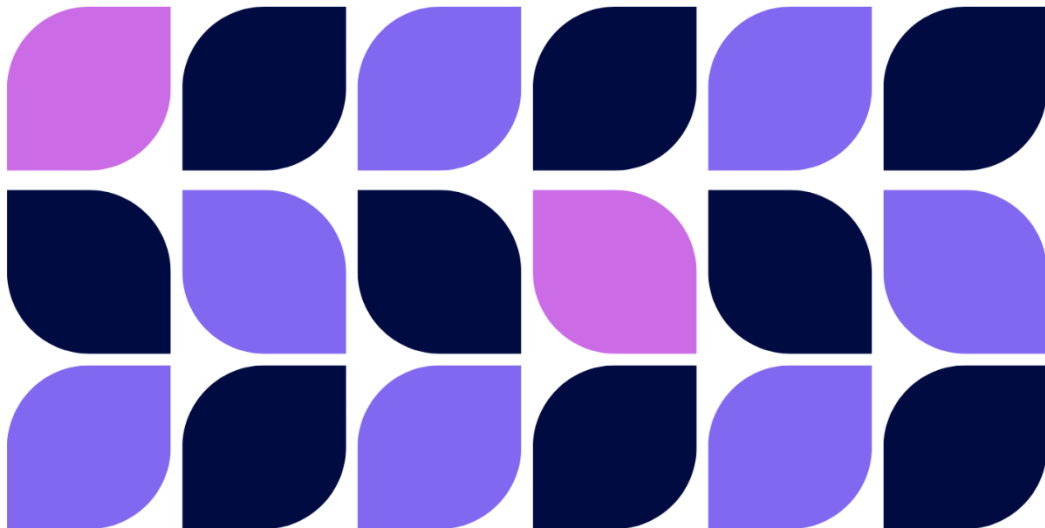


2024

# The Great Big Governance Glossary

An A-Z of governance terminology for  
new school governors, trustees and  
governance professionals



SBW Governance

## Welcome to the 2024/25 version of The Great Big Governance Glossary

Well, what a lot has happened since the last version of the Glossary was published way back in September 2022! Where shall we start?

Be we start thank you to everyone who downloaded or purchased a copy of the previous version(s) – your support was very much appreciated. The 2024/25 version is free. Many people have told me to monetise the Glossary but I don't want to. It is not who I am but if I can help you with governance in any way do please contact me. If I can't help you I probably know someone who can.

Whilst the Glossary has been written with new governors or trustees (sometimes called directors) in mind there may be some of the content that may interest you even if you have been governing for many years. There are lots of hyperlinks and definitions interspersed throughout The Glossary chosen to help you navigate your governance role with ease. If you are new to the role of clerk you may also find The Glossary useful. There are some specific tools to help you at the end of the document. Please feel free to download and amend them as you think best.

Why, you may wonder, have I continued over the years to write a 70 page glossary and not just prepared a list of acronyms? This is because the Glossary has grown from and out of my many and varied years of governing experience either as a governor and trustee or as a Governance Professional and clerk. The Glossary has been designed to help you steer your way through the dense and often complex terminology used in those first few governing board meetings. Sometimes it really does feel impenetrable doesn't it? The Glossary shares links to a wide range of documents, reports and opinion pieces to help get you up to speed quickly so that you are not left thinking *what have I let myself in for...where's the door?* Please note that like most things in governance these days, the Glossary is correct at the time of going to press and more importantly the views expressed and top tips shared are those of the author alone.

The tone of The Glossary is one which is, I hope, easily 'digestible.' If you are in doubt about anything at any point when reading the Glossary go first to the source material and then to your Governance Professional, Chair or Headteacher/CEO.

The Glossary, which is now on its 11<sup>th</sup> iteration (having first started as an email then a pdf and through various newsletter formats), refers throughout to governors although the information it contains applies equally to local governors (called by a variety of names including Local Advisory Board members and Academy Committees) in Academy Trusts [referred to through The Glossary as trust(s)], trustees or directors, clerks and Governance Professionals. The term school is used to mean school and academy - unless otherwise stated. The Glossary may also be of interest to staff governors and those new to school leadership. And relax.

Governors are increasingly being encouraged to take a much more active approach to our own learning and development so whether you have downloaded a copy yourself or been given a copy by someone else thank you so much for reading it - I hope you find it useful.

Be kind!

*Fee Stagg*

October 2024

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## About the Author

### SBW Governance

**Success Begins With ...** is a small North Midlands based education governance consultancy offering a range of governance services.

SBW is owned by Fee Stagg who was, until August 2021, a National Leader of Governance (also known as an NLG). Fee is currently a Chair of Trustees of an Academy Trust in the East Midlands as well as working as a Governance Professional in a number of schools, Trusts and Local Governing Boards. Fee has been a governor, trustee and clerk for over 20 years.

Fee also designs and delivers bespoke training and undertakes External Reviews of Governance and governance health checks. She is also an occasional conference speaker. Do please get in touch to see if she can help you.

Fee is the co-founder of the **National Association of School and College Clerks** ([www.nascc.co.uk](http://www.nascc.co.uk)) a network set up 'by clerks, for clerks' and is proud to be a founder member of **Independent Governor Support**.

**IGovS** comprises over 30 former NLGs who are keen to continue supporting and mentoring chairs, heads and clerks. Further information can be found at [www.indepentgovernor.com](http://www.indepentgovernor.com) and many of the services IGovS offer are free of charge.



In her spare(!) time she writes a light-hearted analogous blog about governance and clerking using the pseudonym The Clerk's Elbow (colloquially known as The Elbow). You can find her blog [here](#).

Please remember that the contents of The Glossary are a *personal opinion* and you may well have other documents and definitions which are peculiar (yes, that is the right word!) to your individual school or academy setting. The Glossary has not been professionally edited so there may be a few typographical errors.

Fee can be contacted on [fiona@sbwgovernance.co.uk](mailto:fiona@sbwgovernance.co.uk) or follow her on Twitter/X at @SBWGovernance.

***Thank you for your support.***

## Introduction

**Dear Reader,**

**Are you sitting comfortably? Pull up a chair, pop the kettle on and we'll begin...**



Picture this. It is just before your first meeting and you have eagerly read all the documents, filled in all the forms and are ready to go. You are still none the wiser.

Fear not, help is at hand.

Being a governor is not like doing jury service - you can say no – but do you realise that you are now a member of one of the largest volunteer groups in the country? It's true, you are. How fabulous is that?!

Being a governor or a Trustee is an extremely rewarding role. It is not always easy but as long as we, wherever we happen to govern, remember that we are governing, and therefore making decisions, for the benefit of children and young people in our care and the staff and leaders who support them then we will not go far wrong.

### Your First Meeting

Before your first meeting you should receive a digital 'pack' of information. This meeting pack (it could be an email or link to a governance information sharing platform) should contain or link to copies of the minutes of the last few meetings, reports written by school leaders, pupil outcome data, budget and finance information and possibly various other documents such as policies, (some of which are statutory). It is a good idea for you to take the time to read the school's latest Ofsted Inspection Report or monitoring letter as this will give you some context. There could be up to 20 attachments in this pack and that is just for one meeting. Good luck with that! No, seriously, The Glossary is here to help and support you by providing some definitions and things to think about.

If you are about to clerk your first meeting as a new clerk there is a checklist at the end of The Glossary which you also might find useful. This is not an exhaustive list by the way so if you are unsure about what something means – always ask; you will not be the only person who does not know. Trust me on that.

### Top Tips

- *Taking notes and being organised is really important so do keep a notebook or note App handy,*
- *Keep all your notes in a safe space and do not share your passwords, lose your printouts or share what is not yours to share,*
- *Think about some questions to ask at the meeting in advance and write them down so you do not forget,*
- *Be on time (preferably a few minutes early). Being late for your first meeting will not give a good impression.*

### So, what is Governance?

Good question. It used to be quite simple when The Governance Handbook 2020 provided a comprehensive overview of governance principles applicable to all types of schools, including both academies and maintained schools. The governance statements in the Academy Governance Guide 2024 and the Maintained Schools Governance Guide 2024 now have specific 'purposes' tailored to the contexts of academies and maintained schools, respectively. These purposes are distinct from those outlined in the Governance Handbook 2020. Keep up at the back!

The key differences between the old handbook and the new are around

1. Context specific guidance
2. Regulatory foci
3. Strategic and operational emphasis
4. Accountability and improvement

It is important therefore to understand what setting you are governing in.

### The Core Functions of Governance

Any board of governors or trustees needs people on the board with the right skills, expertise, behaviours and capacity who collectively:

- understand the purpose and importance of academy trust governance and the role of strategic leadership,
- are committed to, understand and have time for the role,
- are appointed through a transparent process against a clear role specification.

The core functions of governance are focused around:

- Vision, values, mission and strategy,
- Strategic leadership and holding to account,
- Financial and governance probity.

### What's Your Setting?

You will need to understand whether you are governing in a maintained school or in an academy within an academy trust because how you 'do governance' is slightly different in each of them. As far as possible the documents referred to in The Glossary apply to both settings unless otherwise stated (but do double check if you are not sure).

Listed below are some key documents that are the backbone of good governance. However, many of the documents are quite long so do not print them out however they are all free to download<sup>1</sup> and any hyperlinks that have been included in The Glossary will take you straight to the relevant website. Fingers crossed!

- Of first and foremost importance are;
  - The Maintained School Governance Guidance (March 2024)
  - Academy Governance Guidance (March 2024)
  - Academy Trust Handbook (September 2024)
  - Keeping Children Safe in Education (September 2024)
- When the Governance Guidance documents are updated the hyperlink will automatically update. The Governance Handbook together with the latest safeguarding policies, which are discussed later in The Glossary, are your governance cornerstones.
- Of particular interest to clerks are the [primary legislation](#) and the [guidance](#) on the constitution of the governing board. In the past governors used to be given a document called 'The Governors Guide to the Law.' It used to be published on a CD and before that in a printed folder. How times change!
- In terms of Ofsted the inspection framework can be found [here](#) and most boards will (should in fact) undertake some Ofsted related governor training. Having an understanding of the requirements of an Ofsted inspection is important but it should not be the sole driver of our governance activities. Discuss!
- [Understanding your data: a guide for school governors and academy trustees](#). This document sets out 7 themes bringing together a range of information to help boards analyse, discuss, and challenge

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<sup>1</sup> If the hyperlinks do not work – try doing an internet search.

the educational and financial performance of their school or academy trust. There is also some [guidance](#) published by the Educational Endowment Foundation which is free to download. The EEF guide to '*becoming an evidence-informed school governor and trustee*' is designed to offer a quick way into the evidence the EEF make freely available to all schools. If you have some spare time why not have a look?

- You also need to be aware of [The Seven Principles of Public Life](#) – more of which later.
- Safeguarding essentials - you **must** be familiar with the contents of [Keeping Children Safe in Education](#) and most governors sign to confirm that they have read and are familiar with the contents and requirements of the whole document. It is important everyone understands how safeguarding, for everyone not just the pupils, works and why it is so important. KCSIE gets updated regularly.
- If you are a trustee, governor or clerk in an academy (i.e. not a maintained school under Local Authority control) these documents will also be of interest:
  1. The [Academy Trust Handbook 2024](#). The ATH (which used to be called the Academies Financial Handbook) gets updated at least annually and usefully includes a list of what has been updated. If you have time it might be worth having a look at some of the hyperlinked documents. Trustees must read, understand and abide by the contents of the Handbook and it is a good idea if this approval is minuted. In addition Trustees may find the [Academy Trust Governance Code](#) and [Trust Quality Descriptions](#) of interest. These are not statutory at the time of writing.
  2. Of particular interest to clerks and Governance Professionals is the calendar of key reporting and submission [dates](#) published by the ESFA. This will help you check compliance and although this work might be led by your finance and executive team it is good to know the key reporting deadlines. Meeting agendas must always include items on compliance such as the risk register and policies.
  3. Your academy trust's Articles of Association (AoA), which should also be published on the academy website. These are the guiding principles and although they are not an everyday read they are extremely important. There are a range of [model articles of association](#) available on the DfE website. Church based trusts have different [model documents with the purpose of supporting in the Church of England for example Dioceses and Trustees with respect of their duty to ensure the effective \(not merely nominal\) continuance of the Church of England character of the Academy/ Academies, thus enabling the Trustees to show that they continue to carry out their trust and are providing their land for that purpose](#). There are also articles of association for Catholic trusts, a range of supplemental funding agreement models and other key documents. The DfE stresses that *while the model articles are broadly similar, there are differences in the way the governance arrangements at membership and governing body level have been reflected*.
  4. If you govern in a trust in any capacity the Scheme of Delegation is crucially important and whilst they are different for every trust they cover similar activities. The Scheme should also be published on the trust's website and at their simplest are accountability matrices outlining who can take what decision at which level in the organisation. These will be supported by Terms of Reference. Your trust may also have 'standing orders' which are a list of the internal procedures used to ensure compliance with governance requirements. If you are thinking of joining an academy trust, reading and understanding the Scheme of Delegation is a key task for the board.
  5. The Confederation of School Trusts has just published some governance guidance for Trustees – it is well worth a read as it contains lots of questions for boards to ask as well as hyperlinks to documents, research and think pieces. It is free to [download](#).

There are also useful regular newsletters issued by the Education Skills and Funding Agency (ESFA) which you can find on the DfE website. You can also subscribe to these updates – preferably using your school or trust email address.

### Thinking of joining an academy trust?

If you a governor in a maintained school and thinking of joining or forming a Multi-Academy Trust all of the above documents are worth looking at as you plan your decisions. There is lots of advice on the questions to

ask about academisation and there is much thinking to do if your school is thinking of joining a trust available free on the internet. The National Governance Association and the Confederation of School Trusts have some excellent advice (free to download) and one of the best places to start can be found in this [document](#). The report has been designed to help school leaders, trustees and governors better understand the current policy landscape, to consider their options, and to make the best long-term decision for their school. Why not ask another school who has joined the Trust what their ‘journey’ was like and if there are any questions they wished they had asked!

Things do change so always seek external advice and support before making any decisions. You may like to contact other schools and local governing boards in the Trust and ask to meet them. Most will be really welcoming.

### Governing in a Church School

If you are governing in a church school you will also need to follow advice and guidance from your relevant Diocese. Your chair and clerk will be able to point you in the right direction. Some Diocesan Boards of Education run *Welcome to Governing in a Church School* training so these are worth checking out. (Do not book on anything unless it is free, you are willing to pay for yourself or have express permission to book from the school. Budgets are tight). You might find this link useful background reading [SIAMS School Inspections | The Church of England](#) and in Catholic schools and trusts the Section 48 inspections (known as Catholic School Inspections – CSI) look at Catholic Life, the teaching of RE and Collective Worship. One [Diocese](#) has recently shared a blog called ‘Could you be a school governor?’ Many other diocese do the same. Do please do some research.

If you are governing in a church school you should also been given copies of the last SIAMS or CSI<sup>2</sup> reports and someone should take you through what this means to you as a governor.

### Ofsted

You will also need to have more than a passing acquaintance with [Ofsted](#). This website has a large number of useful documents, updates, blogs and links to inspection reports.

### In Summary

The Glossary includes hyperlinks to sources of information you may find useful although this is absolutely not an exhaustive list. There are also a number of subscription-based websites which your board may subscribe to such as The Key, Governor Hub, Trust Governor, Governors Virtual Office, and The School Bus etc –some information is free to download so you will not need a subscription to access the information.

Remember that there is a difference between opinion and fact so when in doubt ask an experienced governor or your clerk.

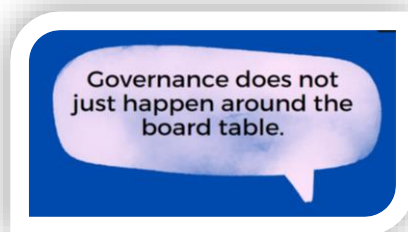
So, for want of a better way of approaching the big, wide world of governance and because the beginning is a very good place to start, we’ll start at A and work our way through the alphabet.

*Here goes!*

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<sup>2</sup> These are explained later in the Glossary





## An A-Z of Governance

### From A to Z and many points in between ...

This A-Z takes a look at some of the most commonly used words and phrases. may wish to add your own definitions to the list or you may disagree with some of the angles and perspectives used but equally you may go ‘yes!’ and experience a light bulb moment.



*Good luck!*

### A is for Accountability

Accountability is one of the words that you will hear most often when you are governing. Accountability is the backbone of governance and is a two way process. What you think or feel about the word accountable depends on whether you are the one being held to account or doing the accounting. Not only do governors and trustees have to, as one of their primary roles, hold the executive leaders to account for the performance of the school you are also accountable to Ofsted, the [Education and Skills Funding Agency](#), the DfE's [Regional Departments](#) and sometimes the Diocese. You are always accountable to the pupils and your school community. You may also find the [principles for a clear and simple accountability system](#) from the DfE valuable background reading. As a number of these documents were published by the previous Government they may be withdrawn over time but they may still be available as archive documents.

In a maintained school the governing board is the school's legally accountable body and is therefore accountable for the individual school to the Local Authority and, if relevant, the diocese or appropriate religious body. In an academy trust – it is the trust board and the Accountable Officer who are responsible and who in turn, are accountable via the Regional Departments to the Secretary of State for Education.

The name of the Accountable Officer should be published on the website and for understandable reasons is usually the highest paid person in the trust.

Here are some simple questions to ask about holding to account.

1. Why not think about what accountability means to you?

2. Are we staying true to our values, culture & ethos?
3. Are we making sufficient progress towards our vision, strategy & development plan?
4. Do we fully understand our current challenges?
5. What could we have done better?
6. How do we know?

#### Top Tip

- An Ofsted inspector or external governance reviewer will not be impressed if you tell them you know because the headteacher told you and you did not seek any evidence for and by yourselves!



#### **A is for Accountable Officer** (academies only)

The Accounting Officer role includes specific responsibilities for financial matters. It includes a personal responsibility to Parliament, and to ESFA's own accounting officer, for the trust's financial resources. You can find more information about this important role in the Academy Trust Handbook. There some<sup>3</sup> [guidance on the role of the accounting officer](#) published by the Confederation of School Trusts which sets out the key roles and responsibilities of the AO. The guidance states *the accounting officer must complete and sign a statement on regularity, propriety and compliance each year and submit this to ESFA with the audited accounts. The Accounting Officer must also demonstrate how the trust has secured value for money via the governance statement in the audited accounts.*

#### **A is for Acronym and Abbreviation**

Governance is full to brim, and meetings are often bursting, with acronyms. It would take pages and pages to fill you in on all the acronyms and abbreviations used and there are some of the key ones you will need for your first few meetings attached at the end of The Glossary. Your school will also have its own commonly used acronyms and abbreviations but you do not need to learn them all. No one will test you but when in doubt ask always for an explanation otherwise you may not know what is being discussed and you may not be able to contribute fully. Remember – acronyms breed so you need to keep up!

There is a useful list of financial acronyms and definitions for academies [here](#).

#### **A is for Action and Action Log**

If you are asked to do something please try and do it and if you cannot undertake or complete the action for any reason or need help please say so. No one expects you to do governance on your own; in fact, no one should do governance on their own.

Actions should not take place in isolation and must be reported as being achieved (or closed) in the minutes. This is usually discussed under the agenda item called Minutes of the Last Meeting and Matters Arising. It is crucial for the purposes of audit that actions are reported and this can include a status update if an action is not complete for any reason.

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<sup>3</sup> This may only be accessible to CST members.

Most clerks include an Action Log as part of the minutes (or on the meeting agenda) and this often acts as a gentle reminder to complete the action. If something has been on the action list for several term's worth of meetings it either needs to be removed, marked as closed or included as an item on the substantive agenda.

This is an example of an action log although your chair and clerk may have their preferred style.

Item no.	Action	Responsibility	Status [insert date]
Useful for cross referencing	What the action is	Person or persons responsible for the action	Complete
			Ongoing
			No Progress

Some things to ponder...

1. If all the actions identified on an action log are for school leaders is this governance or management?
2. If all the actions are for the clerk or Governance Professional are they in danger of becoming a de facto governor?
3. If all actions identified are for the chair is this effective governance?
4. If there are too many actions that are ongoing this can be a bit of a worry. Why do you think that is? What do you think you can do about it?

### A is for Admissions

Admission criteria are different for each school so it is wise to check and all schools must approve an Admissions Policy each year with the majority of schools and trusts adopting the Local Authority policy. Some trusts and Voluntary Aided schools are also their own admissions authority. DfE guidance and criteria can be found [here](#). You may also be interested in the [School admissions code](#). Where changes are proposed to admission arrangements, the admission authority must first publicly consult on those arrangements<sup>7</sup>. If no changes are made to admission arrangements, they must be consulted on at least once every 7 years

All state-funded schools must give top priority to admitting children who:

- are in care or being looked after,
- have been in care.

Each school must publish information about its admissions on the website and governors are asked to approve the policy at least 12 months in advance. You may be asked to sit on an Admissions Appeals Panel - if this is the case you will receive support from the clerk or chair. It is a good idea to get some training first.

### A is for Adverse Childhood Experiences (ACE)

Some boards discuss the impact of ACEs on the children and young people in school. Your school or Trust safeguarding lead will be able to help you further. Some schools are Attachment Aware Schools and this [pdf](#) is one of many useful documents available to download from the internet which gives some background.

### A is for Agenda

Each meeting must have an agenda otherwise how will you know what you are supposed to be talking about? Agendas should be sent out usually by the clerk **at least 7 days** before the meeting. You should also receive at the same time a full set of accompanying documents. Documents should not be presented to you (also known as tabling) at the meeting as this does not allow you time to read, digest and interpret the information. Some chairs refuse to accept tabled reports because they consider that as no one has seen them before they will not have been able to give the contents due consideration.



If you are struggling for an analogy – think of your agenda like a washing line. Big things in the middle; little things on each end. Agendas can drive meeting energy and if we are spending too long on the minutia then we may well miss the bigger picture.

A good agenda is a thing of beauty and has a clear purpose, clear goals and clear outcomes. Have a look at D is for Decision for some thoughts on decision making.

### **A is for AGM**

All Academy Trusts must hold an Annual General Meeting in one form or another. The new Academy Trust Handbook states that *it is important for members to be kept informed by trustees about trust business so they can be assured that the board is exercising effective governance and use their powers to step in if governance is failing. This **must** include providing the members with the trust's audited annual report and accounts.*

Trustees are welcome to attend the AGM but unless otherwise invited it is not usual for local governors to attend. AGMs are not usually long meetings.

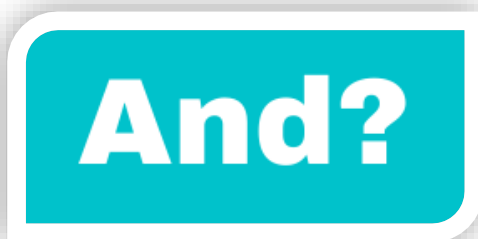
### **A is for Apologies** (see also N is for No Show)

It is really important that if you know in advance that you cannot attend a governors' meeting that you submit your apologies (usually to the clerk). If you do not submit apologies for 6 months you may well find yourself suspended from the board. If you have a personal reason (such as ill health ) which means you cannot attend the meetings please let the clerk know – you do not have to share personal details but it is good that the other governors know you are not able to be there. Sometimes a virtual link to the meeting can be provided so you can still attend. It is not usual for the reason for your non-attendance at the meeting to be written in the minutes and confidentiality should be respected. Remember that attendance at governing meetings is published on the school website. If you need help with child care costs – please ask for a copy of the Governor Expenses Policy – no one should be additionally out of pocket because they are a governor.

If a governor regularly and routinely sends apologies but the board does not wish to accept the apology then they do not have to do so. This decision will be minuted as 'Governors received but did not accept the apologies from...' This information will also be published on the website. It is always best to try and attend all the governing board meetings – after all you should have the dates well in advance and you have made a commitment.

### **A is for And**

And is a very small but powerful word. By asking and? More often we can have deeper and more wide ranging conversations. Think about asking '*and then what happened/do you expect to happen/difference you want to make.*



### **A is for Articles of Association (AoA)**

If you govern in an academy these are your principle documents. Most academies, but not all, base their articles on [these](#) which are the [DfE](#) model documents. The AoA were last updated in June 2021. The AoA is the document which sets out how the governance arrangements for the trust are structured. They also set out the procedures for meetings and how governors and trustees are appointed. The academy memorandum and articles of association set out the internal management, decision-making and processes of the academy trust and its various liabilities. They form an annex to the funding agreement for each academy. If you govern in a church based Trust there are separate AoA for Church of England and Catholic academy trusts as mentioned in the introduction to The Glossary. Trusts should publish their AoA on their websites. You do not need to worry too much about the AoA unless you are the clerk or Governance Professional as they need to know the detail ins and outs of the constitution to ensure that meetings are quorate.

### **A is for Asset**

The completion of the asset register is not the role of the governors or trustees but they must check that the asset register has been completed. Sometimes approval is required to dispose of an asset.

### **A is for Associate Members (maintained schools)**

Associate Members<sup>4</sup> (AMs) are not governors. Repeat after me Associate Members are not governors! Associate Members are people who are appointed onto the board for a specific length of time, usually 12 months, to play a specific role or because of their particular knowledge, skills and/or expertise. Their joining the board must be minuted. They can attend the Full Governing Board (FGB) meeting but cannot vote at the FGB unless this is explicitly given and this is minuted. AMs may be excluded from any part of the meeting that concerns staff or pupils. They can vote on committees but again only if the governing board agrees and this is minuted. Like governors they must be over the age of 18. Also AMs cannot chair the FGB, they do not count towards the quorum and whilst their information needs to be listed on the school website as yet it does not need to be published on the [Get Information About Schools](#) website. Often staff such as the School Business Manager are Associate Members but this is not strictly necessary as they should be attending and/or reporting to board meetings as a matter of course. They should of course undertake any safeguarding training required of them.

Being an Associate Member is very rewarding and many go on to become governors.

### **Top Tip for Clerks**

- Check the end dates of your Associate Members and check whether they are adding anything to the board.
- How many Associate Members are there on the board and should some perhaps be in attendance by virtue of their role in school?

<sup>4</sup>[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/640562/The\\_constituti\\_on\\_of\\_governing\\_bodies\\_of\\_maintained\\_schools\\_2017.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/640562/The_constituti_on_of_governing_bodies_of_maintained_schools_2017.pdf) Para A.8

## A is for Attendance

All children and young people should have the opportunity to be included, fully engaged and involved in and with their learning and to participate fully in the life of their school. Governors should always ask for data and updates on pupil and staff attendance, persistent absence and holidays in term time. Ofsted will most certainly ask if your school had data below the national average.

Sometimes the school register is audited, and it is good for the governors to ensure that the register is compliant and all the correct absence codes have been used. Mistakes can be made but if these are deliberate or regularly in error you need to know. There are a variety of absence codes (there were new codes issued during the Covid-19 pandemic for example) used by schools on the attendance register – having an awareness of these is useful but you do not need to know the detail. Please also read O is for off rolling.

[Working together to improve school attendance](#) was also published in May 2022 (effective to September 2024) and is guidance to help schools, academy trusts, governing bodies, and local authorities maintain high levels of school attendance including their roles and responsibilities. It is anticipated that this will be updated. From August 2024, the fine for school absences across the country will be £80 if paid within 21 days, or £160 if paid within 28 days. Governing boards may well see an increase in parental complaints relating to this increase – if a parent approaches you tell them to contact the school – you cannot get involved whatever your personal views. This is not always easy. Most schools have issued letters to parents explaining the new fines and how these will operate.

[Suspension and permanent exclusion guidance September 2023 \(publishing.service.gov.uk\)](#) is the latest guidance on this important aspect of attendance. If you are asked to sit on a panel please ensure that you have read this document. You should receive some training prior to sitting on a panel as these are not necessarily straightforward.

Some questions you could ask about attendance<sup>5</sup>

- Do our policies and practices promote and explicitly value good attendance (with pupils, parents, and partners)?
- Is our approach to promoting attendance inclusive and addressing equity issues?
- How can partnership working with parents, community and family learning, and other partners, be developed further to increase attendance and manage absence?
- Do the pupils understand the impact of not attending school? Particularly for those who travel to school by themselves.

## A is for Audit

Audits should be nothing to be frightened about if you know your school and you are all well prepared.

Audits can be very useful activities and common audits are safeguarding, Pupil Premium, Special Educational Needs and Disabilities, Teaching and Learning and health and safety and of course different subjects. These should all be reported to the board and you should be given the opportunity to ask questions.

### Academy Trust Audits

In an academy trust internal and external audits that take place annually and both are now undertaken by different external organisations. At local governing board level you probably will not have much involvement in these audits but you can help by ensuring that all minutes are signed, all policies adopted and that the information required to be published on the school's website is as up to date as possible. An external auditor will provide a statutory audit for the trustees into the financial statements. All academy trusts must have a programme of internal scrutiny which can look at a range of activities that carry a risk. Common themes

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<sup>5</sup> [Promoting Attendance: self-reflection questions for educational settings | Self-evaluation | National Improvement Hub](#) [Scotland]

include cybersecurity, payroll and governance. Scrutiny areas will be different in every trust depending on need and circumstance.

Schools which convert to academy status are subject to a detailed Finance, Management and Governance Audit within 4 months of opening but as a new governor you probably will not have much to do with this particular audit. Information on FMG audits is available [here](#). The requirements in the FMG checklist apply from the date on which the funding agreement was signed, so new academy trusts should ideally consider an FMG before opening their first schools.

Understanding the role of audit is a key element in understanding the role of compliance.

## B is for Benchmarking

Boards are increasingly undertaking benchmarking activities. Common areas for benchmarking are

- Equity and inclusion
- Executive Pay (academy trusts)
- Financial Health
- Governance and leadership
- Operational costs –premises and energy costs
- Wellbeing

This report, although a few years old, is a good starting point - [School resource management: top 10 planning checks for governors \(2018\)](#)

It is important to understand the difference between benchmarks and milestones - benchmarks help you understand where you stand in relation to a standard, while milestones help you understand how far you've come in a project or process.

These are some benchmarks<sup>6</sup> offered by a well-known AI platform (well, why not!?) – what do you think about the targets? Useful starting point?

	Benchmark	Why It Matters
<b>Board Meeting Efficiency</b>	Meetings should start and end on time, with at least 90% of the agenda covered within the allocated time.	Efficient meetings reflect good planning and time management, ensuring that the board is focused and productive. This benchmark also indicates that the board is effectively prioritising its discussions and decisions.
<b>Board Member Attendance and Participation</b>	At least 95% attendance rate at board meetings, with active participation from all members.	High attendance and participation rates demonstrate commitment and engagement from board members, which is essential for informed decision-making and accountability.
<b>Strategic Plan Alignment and Progress</b>	80% or more of strategic plan objectives should be on track or achieved within the designated timeframe.	This benchmark ensures that the board is effectively guiding the organisation towards its long-term goals and regularly reviewing progress against strategic priorities

<sup>6</sup> I asked Chat GTP for a top 5 governance benchmarks – what do you think?



<b>Policy Implementation and Review</b>	All key policies should be reviewed and updated at least once every 3-5 years, with 100% compliance with review schedules.	Regular policy reviews ensure that the organisation's governance framework remains relevant, legally compliant, and aligned with current best practices.
<b>Stakeholder Communication and Transparency</b>	Timely communication of board decisions and rationale to stakeholders, with at least 90% of key decisions communicated within two weeks.	Effective communication and transparency build trust with stakeholders, including staff, parents, and the community, ensuring that the board's actions are understood and supported.

### B is for Blog

One of the interesting and often cost-free ways to undertake free CPD is to read and review blogs; you may feel brave enough to start writing your own! Blogs are opinion pieces that are designed to inform, challenge and make you think. Ofsted publish blogs regularly and these are often accompanied by podcasts. Blogs are an easy way to keep yourself informed and challenged but do not forget that blogs are often written to provoke a reaction so remember to separate fact from fiction!

There is a blog produced by governors and clerks for governors and clerks called the **Governors Podcast** and you can listen [here](#) for free. It is a great listen. If you are a clerk you may enjoy this [The Clerk's Elbow](#) (which is an analogous look at governance behaviours and is not entirely serious).

### B is for Board

All schools and academies have a governing board or body. In an academy trust governance responsibility sits at the trust board level and is managed through the Scheme of Delegation. In a maintained school there is a governing board which must meet at least 3 times per year as a minimum. If anyone tells you that you will only have to attend 3 meetings per year as a new governor they are probably being somewhat economical with the truth!

In an academy trust, to differentiate from a maintained school, the governing board at school level is called a Local Governing Board or Body (LGB), Academy Committee or Council (AC), Local Academy or Advisory Board (LAB). Yes, it is confusing, and no, they do not do all the same things! If you are in an academy trust you need to read the Scheme of Delegation which outlines each layer of governance can and cannot do. It may be easier to think of the scheme of delegation as an *accountability matrix* – a sort of 'who can do what' list. All Schemes of Delegation are different so you do need to read yours carefully.

Not all academies use the word 'governing' in the same way – if you read the guidance governance in an academy trust is at the trust board level. There is much discussion amongst governors who sit on LGBs about this as you can imagine. The key thing to understand is what type of school you are governing in because this often and usually frames the questions we need to ask.

The people who should **always** attend a board meeting irrespective of setting or layer are;

- The Chair (a meeting chair can be appointed if the chair is absent – this must and should not be the headteacher),
- The Headteacher/Principal/Exec Headteacher/CEO,
- The Governors or Trustees,
- The Clerk; increasingly called the Governance Professional.

Others who **may** be at meeting depending on the school and setting:

- Associate Members (maintained schools),



- Members of the Senior Leadership Team e.g. School Business Manager, members of the Trust leadership team,
- Sometimes an academy trust board will send a Trustee or representative, they do not usually have a vote (however in some Trusts they do) to an LGB meeting.
- Anyone else who is invited e.g. pupils, outside speakers, members of staff giving a presentation.

No one cannot just turn up at a governing board meeting; it is not a public meeting. No one cannot just turn up at governing board meeting. The only people who are not governors who can go to a meeting are those who are invited. That sounds a bit like a closed shop – it is not that bad.

Minutes must be available on request and are covered by Freedom of Information requests (as they are legal documents) but remain confidential until the board has agreed to them and they have been circulated to those attending the meeting. Trustees should have access to all the minutes from the LGBs including the confidential minutes (generally speaking although there may be exceptions) as LGBs are subcommittees of the board itself. Draft minutes may also be requested and if this happens it must be stressed that the minutes are draft and potentially subject to change. Some minutes may be redacted to protect sensitive or personal information. For further information on what can and cannot be made public check the Information Commissioner's Office website or contact your school or trust's Data Protection lead. It is better to be safe than sorry. See also M is for Minutes.

#### Top Tip

- Clerks – check who has voting rights – in some Trusts, the Trustee link representative forms part of the quorum.

#### B is for Budget

All schools and trusts are increasingly having to take a much more prudent approach to budgeting and forecasting. If you are interested in how schools and trusts are funded and how financial decisions are made joining the finance committee is an excellent way to find out more and to help ask the supportive and challenging questions.

This is a useful article on school budgets - [Balancing school and trust budgets: three questions to ask \(NGA\)](#)

#### C is for Careers

What is the purpose of education? This esoteric question is one which taxes many of us. One of the various pieces of guidance issued by the DfE on careers goes some way to helping us ask the right questions about [careers](#) and is statutory guidance from 2021. Some schools appoint a governor to lead on asking questions about careers and some primary schools have a careers policy. It is mandatory for secondary schools to nominate a governor to take responsibility for careers. You should have a governor who takes a strategic interest in careers education and guidance and encourages employer engagement. The role is outlined in a DfE document called [Careers guidance and access for education and training providers](#). The governing board should provide clear advice and guidance on which the school or college leader can base a strategic careers plan which meets the legal or contractual requirements of the school or college; and *the governing board should provide clear advice and guidance on which the school or college leader can base a strategic careers plan which meets the legal or contractual requirements of the school or college*.

All governors and trustees should be asking questions about careers, aspirations, qualifications and destinations of Year 13 students as a minimum.

#### C is for CEO

Chief Executive Officers work in Academy Trusts are usually the trust's Accounting Officer as well. They are the main person leading and managing, with the support of the trust board and the executive leadership team, the whole organisation. If you are on a Local Governing Board in a large trust you may not meet the CEO in person but you must know who they are. You can look them up on the trust's website. Sometimes the CEO is called the Senior Executive Leader.

Sometimes, but not always, the CEO is also a trustee. What do you think the benefits and disbenefits are of having the CEO as a trustee?

### **C is for Chair**

Every board needs a chair and every meeting needs a chair. They do not have to be the same person. The chair of the board, often called the Chair of Governors or Trustees, is a position elected on a regular basis (usually but not always annually) by the other members of the board and should be the person with the most appropriate skills and experience and it should not be a popularity contest. Whilst there is no rule to say how long a chair should be the Chair<sup>7</sup> common sense would suggest they should not be chair forever. The National Governance Association (NGA) recommends 2 terms of 4 years but this is not statutory. Every chair must have a vice chair and this role is becoming increasingly important not only in terms of succession planning but also in support of distributed leadership. The chair and vice chair should work together supporting and challenging not only the leadership but each other. Some boards have co-chairs (more common in maintained schools) – this is a great way to manage the increasing workload but there needs to be fair and appropriate division of workload and clear lines of communication.

In an academy trust it is vital that there is separation of duties between the Chair of Trustees and the Chair of the Audit and Finance Committee(s). This is to ensure transparency and oversight. It would make sense that this was also the case in a maintained school as well.

There are also chairs of committees which are also important roles and a strong committee chair is an asset to any governing board.

Some schools and trusts have a specific role description for the chair. This is very much a starting point of minimum requirements. Chairs of Trustees are subject to specific additional DfE suitability checks.

Some boards have co-chairs where two people share the role. This is a great way to share the workload but there must be clear lines of accountability between the two co-chairs.

### **C is for Chair's Action**

One of the main standing (regular) items on a board meeting agenda is Chair's Action – this is different from Power to Act (see below). Chair's Action is often used by chairs to give a short update, an outline of actions taken that are not Power to Act (e.g. meeting the Headteacher, attending meetings in capacity as chair and so forth). There is not necessarily a written report but the headlines should be reported in the minutes. Some chairs prepare regular newsletters – where do they find the time?!

### **C is for Chair's Power to Act**

Regulation 8 of the School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 sets out the chair's power to act on behalf of the governing board in cases of urgency or emergency. This is not the most exciting of reads but it is really important that chairs only do what they are allowed to do by law. All actions must be reported to the board – it says so in the regulations. If your chair is using power to act a lot it is perfectly acceptable to ask why. A record always needs to be kept. Please note it is not good governance for someone to make decisions outside of the board meetings unless those decisions are very, very urgent.

In a trust delegated power must be expressly given and recorded as being given in the minutes and even if academy trusts have delegated power to the Chair there may be restrictions.

### **C is for Clerk**

Every meeting where governors and trustees are in attendance and decisions are made needs a clerk.

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<sup>7</sup> Also chair of trustees



A clerk is an increasingly professional role (and is now often called the Governance Professional especially if they have undertaken governance and clerking qualifications) and are the constitutional and legal conscience of the board. They should be impartial and preferably independent of the school (or as a minimum someone who is able to act impartially and challenge with confidence). Clerks should always be paid to take the minutes.

The chair, the headteacher and the clerk should be in regular communication. As a new governor you will not necessarily be in regular contact with the clerk between meetings but you need to know how to contact them.

If a meeting takes place between two or more governors about a school related issue a record should be kept. These meetings do not necessarily need to involve the clerk. What we need to ensure is that we avoid cliques forming. The chair and headteacher will meet more often than other governors and this is an important and privileged relationship but should not be too cosy; neither should it be strained. As a new governor you need to understand how the dynamics of the relationships around the board table work and if they look or feel awkward or unprofessional then do raise any concerns but please do so respectfully. The clerk may be able to help you understand how the board operates.

Your clerk is there to offer advice and support for the whole board. Sometimes the clerk will lead part of the meeting e.g. the election of the chair of the board or give an update on training opportunities or key documents and advice the board needs to follow. A clerk should never be 'seen but not heard'!

In an academy trust the Governance Professional will sometimes clerk all the trust board meetings but not all the local governing board meetings (which may be clerked by others under a service level agreement or contract). The Governance Professional is sometimes called the Trust Governance Lead or Head of Governance and you need to find out who they are. Sometimes there is a governance team and sometimes it is one person who may not be full time and if your clerk is the latter, please be patient when waiting for a response.

Often clerks will be provided under a Service Level Agreement and the school pays an annual fee to the service provider (this is not always the Local Authority) for a set number of meetings. If you are the chair of governors, it is a good idea to find out exactly what you are paying the clerk for, what the service provides centrally and what the school should be doing. This can include agenda setting, managing the governance databases, managing elections, clerking panel meetings but this is not always the case.

In some Trusts, the clerk role is undertaken by the Company Secretary whereas in others the clerk role is undertaken by someone who works in school in another capacity. If this is the case, they must have a separate job description and be given adequate time to complete the minutes and do the board admin. It is important that they remain impartial and respect confidentiality.

It is harder to clerk than it looks to clerk well and your clerks do a lot more than take the minutes of the meetings you are attending!

### **C is for Code of Conduct**

You will also be asked to sign, or at least you should be (if not please ask), a code of conduct on an annual basis. The code sets out which;

- sets out clearly the purpose of the governing board,
- outlines the behaviours expected from those who are governing,

- describes the appropriate relationships between individual governors/trustees/staff/academy committee or LGB members, the whole governing board and the executive leaders in school.

Lots of boards use the NGA<sup>8</sup> Code as a basis for their codes; others use one designed by their local authority or diocese and amend to fit their school. It is not compulsory to have a code of conduct but very good practice. Hint.

Everyone in public life is bound by the Nolan Principles and these underpin the code of conduct.

### **1. Selflessness**

Holders of public office should act solely in terms of the public interest.

### **2. Integrity**

Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships.

### **3. Objectivity**

Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.

### **4. Accountability**

Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.

### **5. Openness**

Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.

### **6. Honesty**

Holders of public office should be truthful.

### **7. Leadership**

Holders of public office should exhibit these principles in their own behaviour and treat others with respect. They should actively promote and robustly support the principles and challenge poor behaviour wherever it occurs.

If you are a clerk the principles also apply to you and you may wish to sign the code of conduct at the same time as the governors or trustees or minute that you are willing to follow its requirements.

A good code of conduct will also include reference to the school or trust values. It is important that you read the Code of Conduct carefully before you sign it so that you know and understand the expectations and behaviours required of the role; hopefully, you will not find yourself being held to account for breaking the code of conduct. Unfortunately, this does happen. [Top Tip](#)

- Ask yourselves what do the Nolan Principles mean to you and your board? You might get some interesting answers and it is a quick and thought provoking way to think about the governance behaviours around the board table.

## **C is for Cohort**

Cohort means a group of people with a shared characteristic. The most common are;

- year groups,
- girls and boys,
- pupils for whom English is not a first language,

<sup>8</sup> You do not have to join the NGA but lots of governors and boards do. There is also the Confederation of School Trusts if your board is a member of a MAT. You cannot join CST as an individual.

- pupils on the SEND register,
- pupils in receipt of pupil premium,
- safeguarding information (anonymised)
- at secondary or tertiary level by subject.
- other groups appropriate and relevant to your setting

Remember if your cohorts are small one pupil could account for 5% or even 8% of the total. Always ask how big the cohorts are as this will affect the way you interpret the data. Another good question to ask is how many of the same children started the academic year as finished it or how many started in reception and left in Y6 – this is sometimes called **pupil mobility**. In some schools this movement can be up to 30%. Think about how this might affect the outcomes or assessment data. Lots of data reports identify both the percentage and the number in the cohort for context.

### C is for Collaboration

You cannot govern in isolation. It is becoming increasingly common that schools work together even if they are not part of a formal structure such as an Academy Trust. Being collaborative is about looking outwards and not inwards.

Some trusts are now working with associate partners – schools with similar values who are not ready, for a variety of reasons often related to finance and leadership, to join an academy trust.

### C is for Committee

Not all governing boards have committees but if they do, they should have a chair, some approved terms of reference, minutes (preferably taken by the clerk<sup>9</sup>) and an agenda. Committees are the engine room of any governing board and is where the nitty gritty discussions take place and detail is disseminated. It is important that you attend these meetings so that you know what is going on.



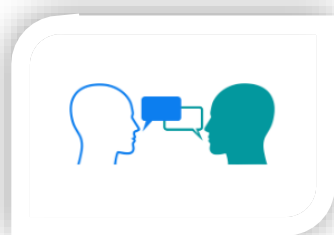
Attendance at committees (especially finance meetings) must also be published on the school website.

Some maintained schools do not have committees and all matters are discussed by the whole board at full governing board meetings. This is sometimes called the **circle model** of governance. If this is the case in your school there should be a separate pay committee to make the necessary recommendations to the board to ensure there is full transparency.

<sup>9</sup> Committee minutes can be taken by a governor, but this does mean that they cannot participate fully in the meeting. Have a think and see if you can find someone else who may be willing to take the minutes. It is not a good idea for school business leaders to take minutes at resources committee meetings – they are reporting to this committee and there needs to be transparency and distance to allow effective decisions to be made. Remember the Headteacher or member of staff should not take minutes or chair a meeting; not the same should apply to the Business Manager too. In maintained schools the regulations state that Headteachers cannot take minutes.

## C is for Communication

It is always worth investing time in communication although this is not always easy and takes effort and focus.



As a new governor you may find yourself cornered in the playground by parents looking for answers. This is sometimes difficult but you must refer them to the Headteacher or chair and to the Complaints Policy. However, as *‘talking is the start of understanding’* try and communicate and explain that you have to refer people to the policy and that doing so is not personal.

Some schools and trusts have communication strategies and it is worth having a read of these to ensure that you follow agreed protocols especially if you are involved in a formal complaint. You will be asked to approve the Complaints Policy on a regular basis so do please read it.

Some agendas have a specific item on communication (including correspondence) which allows governors and trustees to agree items to be communicated and shared with others. The chair or Headteacher should explicitly highlight matters which cannot be shared outside the meeting.

### Top Tip

- Check that your Complaints Policy is up to date, is fair and equitable, and is easy to read and follow.

## C is for Competent

No one, one would hope, is deliberately incompetent and with the amount of information available on the internet these days there is little excuse for not knowing what you should know<sup>10</sup>.

The late Donald Rumsfeld, former United States Secretary of Defence, once said:

*Reports that say that something hasn't happened are always interesting to me, because as we know, there are known knowns; there are things we know we know. We also know there are known unknowns; that is to say we know there are some things we do not know. But there are also unknown unknowns—the ones we do not know we do not know..., it is the latter category that tends to be the difficult ones.*

Perhaps this quote is something perhaps we could all give some thought to and think about how we will find out what you do not know? Even experienced governors learn new things!

## C is for Confidentiality

Agreeing that something should be kept confidential is more than just a *‘rubber stamping’* exercise, more than just keeping minutes on a confidential file and more than something we all nod through at the beginning of a board meeting. Agreeing that something is confidential should be done with good reason and not because people want to keep things quiet.

Effective governance should always be open and transparent and you should always follow the board and school protocols on confidentiality. The confidentiality protocol also applies when you leave the board.

<sup>10</sup> © [purplegovernance.co.uk](http://purplegovernance.co.uk) 2018

If you are especially or particularly concerned about some do please refer to the school or academy trust's whistleblowing policy.

### **C is for Conflicts and Declarations of Interest**

A conflict of interest can arise if you have any interests that may affect, or be seen to affect, your ability to take impartial decisions in the best interests of the school. These 'formal' conflicts may arise from business or financial activities, from personal relationships or if you are a governor or trustee in another school or academy or charity. 'Informal' conflicts are those such as friendships that do not need to be recorded in the minutes but which can influence the way we make decisions so we need to be aware.

In maintained schools<sup>11</sup> for example governors need to declare

- any business interests they or any member of their immediate family have
- details of any other educational establishments that they govern
- any relationships between school staff and members of the governing body

At the beginning of every meeting there should be an opportunity for you to declare any business or pecuniary interests you may have in any matters on the agenda. It is increasingly important, in the name of transparency, that these are recorded. It is also good practice that you inform the school of any business interests you may have as these have to be kept on a register. You will also be asked to complete a business interests form (this may be online) on a regular basis and it is up to you to ensure that you inform the school of any changes. Business and governance interests must be published on the school or trust website. If you are not sure, talk to the chair, clerk or the School Business Manager (as they often lead on this area).

It may be appropriate once you have declared an interest that you are asked to withdraw from the meeting for the relevant item of business and you will not be able to vote on the matter under discussion. Just because you have declared an interest does not mean that the conflict is mitigated and this key fact is sometimes forgotten.

When in doubt – ask.

### **C is for Co-opted (both academies and maintained schools)**

In a maintained school Co-opted governors are appointed by the board because, in the opinion of the board, they have the requisite skills and experience to contribute effectively to governance in that setting. Again, these are not popularity contests. Further information on the constitution of maintained school governing bodies can be found [here](#).

Some trusts have trust appointed governors as well. As with other governors the term of office is usually 4 years. Some trust boards also have a process for approving co-opted governors appointments where the trustees review the skills and experience of the potential governors prior to them joining the Local Governing board.

Co-opted governors used to be called Community Governors and in some trusts they are still referred to as such.

### **C is for Covid-19**

The coronavirus pandemic changed many things about governance, especially meetings which now take place online far more frequently than before the pandemic. This showed us that

- you do not always need to physically be in school to govern effectively.
- virtual meetings can be just as effective as face to face meetings and anecdotally governor attendance and participation in meetings increased during the periods of lock down.

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<sup>11</sup> [Schemes for financing local authority maintained schools 2024 to 2025 - GOV.UK](#)



It is important to remember that the impact of Covid on our children and young people is still very evident and will be for some time. It is important that governors and trustees understand this impact.

### C is for Climate Change

The National Governance Association have produced some useful guidance for their members. This guidance includes links to free resources such as from the [UN Climate Change Organisation](#). They have also produced [Environmental sustainability: a whole school approach](#) which is an important read for everyone. The guidance sets the context in its opening paragraph *“schools have a crucial role in achieving environmental sustainability because they help young people understand the world and develop skills and attitudes to live fulfilled lives as responsible citizens. It is a core function of boards to determine the values, vision, ethos, and strategic priorities of the trust or school it governs. Governing boards are therefore in a position to consider their role in environmental sustainability and ensure that their trusts and schools take action.”*

Maybe climate change and environmental sustainability should be an item on every board agenda?

### C is for Culture

There are many, many books on culture and you will often hear the word used when discussing schools. Culture is really important and how the school perceives and defines culture is both interesting and important. It would take too long in this Glossary to define culture but if you think about the following questions then you may be able to capture the culture of your governing board;

1. What does the school feel like?
2. What do our meetings feel like?
3. What words would I use to describe the culture of the school?
4. Where is the evidence of the culture in practice?

In the context of governing board behaviours, **culture** refers to the collective norms, values, attitudes, and practices that shape how board members interact, make decisions, and fulfil their responsibilities. It encompasses both the formal and informal aspects of governance, including:

1. **Decision-Making Processes:** How decisions are approached, debated, and agreed, reflecting openness, inclusiveness, and transparency.
2. **Communication Style:** The tone, frequency, and transparency of communication among board members and with stakeholders, and how this impacts and affects trust and collaboration.
3. **Accountability and Ethics:** The board's commitment to ethical standards, integrity, and accountability,
4. **Risk Tolerance:** The board's attitude toward risk-taking and innovation, which can either encourage proactive strategies or foster a more conservative approach.
5. **Diversity and Inclusion:** The board's approach to hearing and responding to diverse perspectives and developing inclusive practices.
6. **Conflict Resolution:** How the board handles disagreements and conflicts, whether through constructive dialogue or avoidance, and how this affects overall board cohesion.
7. **Leadership and Influence:** The balance of power among board members, the influence of the chair, and how leadership is exercised and distributed within the group<sup>12</sup>.

It is crucial that as governors and trustees we talk about culture more – after all doing so is part of our first core function. One of the many thousands of blogs and articles on culture in schools can be found [here](#) – it is one perspective obviously but a good place to start. What do you think?

<sup>12</sup> Yes, Chat GTP to the rescue! Q - ;define culture in terms of governing board behaviours; created and amended 14/08/24





Whatever your personal views on culture it is critical that first and foremost everyone has a lived culture of safeguarding.

There is a free document available to download called [The Expert Edit - Building school culture](#) but there are a wide range of other resources available.

### **C is for Cultural Capital**

There are some interesting discussions to be had around the definitions of cultural capital. Ofsted state that *cultural capital is about the extent to which schools are equipping pupils with the knowledge and cultural capital they need to succeed in life. Their understanding of 'knowledge and cultural capital' is derived from the following wording in the national curriculum 'It is the essential knowledge that pupils need to be educated citizens, introducing them to the best that has been thought and said and helping to engender an appreciation of human creativity and achievement.*

Has your board discussed what they understand by cultural capital? Do you think it matters?

### **C is for Curious**

If you're not curious then why are you a governor or trustee?

**Curious Questions  
Matter.**

Please be curious and not passive. If you feel something is not right say so; ask questions; consider the answers; seek more information. It is important to remember to balance curiosity with reasonableness! Professional curiosity is something governors and trustees need to be as well; after all this is what our safeguarding training tells us.

### **C is for Cyber Security**

This is increasingly important. You will be given a school email address and access to online information. You must ensure that you follow any instructions about keeping information safe, password control and confidentiality. Schools and academies have been hacked and held to ransom so cybersecurity must always be high on everyone's agendas.



Some useful questions for governors and trustees about this important topic can be found [here](#). The website says *cyber security is about protecting the devices we use, and the services we access online from theft or damage. It is also about preventing unauthorised access to the vast amounts of personal data we store on these devices and in online accounts. A cyber security incident can affect the school's ability to function, the security of its data and its reputation. Both the school leaders and the governing body will want to ensure they are aware of cyber risks and adequately prepared in the event of a cyber incident. Schools will already be following similar approaches when it comes to managing risks and responsibilities around GDPR and pupil safeguarding more generally.*

#### Top Tip

- If you have a school or trust email address – use it. It may be a little inconvenient at times but this is a minor irritation compared to dealing with a cyber incident or having to provide all your personal emails for a Subject Access Request. Schools and academies are increasingly being targeted by cyber-attacks.

#### D is for Data

It is really important that if you are a new governor you are given data about the school. You should not have to be a data analyst to interpret the data provided! In fact, as a new governor you are in an ideal position to let people know if the data is actually impenetrable as it is easy to slip into accepting confusing or complex data without challenge and that this then becomes the norm. You should be reminded at your first few meetings that if you are a parent you must not discuss your child's data or personal circumstances in the governing board meeting and your first port of call is your child's class teacher.

As a board you should spend time discussing any gaps the data highlights and some key questions include

1. Are there differences between what the school predicts the outcomes will be to what the outcomes actually are? This is a really important question and should always be asked. There can be a positive and a negative difference.
2. What happened and why; and
3. What are the school leaders going to do differently? What else do we need to ask?

Some useful websites to help you generate those all important questions are

- [School Performance Tables](#)
- [Get Information About Schools \(GIAS\)](#)<sup>13</sup>
- There are lots of blogs and articles and training about data which you can easily find on the internet,
- The National Governance Association has a range of documents called 'Knowing Your School.' some of these are behind a paywall but there are lots of free examples on the internet and in closed Facebook Groups for governors. See also [N for Networking](#).

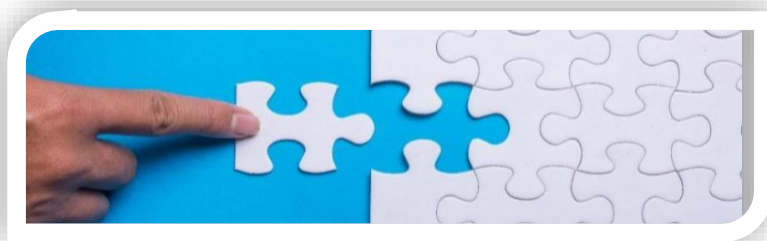
<sup>13</sup> As a governor or trustee you can look up any school or governor/trustee in England but will not be able to make any changes to the information yourselves.

Remember your minutes must show evidence that you have had discussions about data – the clerk should capture the essence of the discussion, the challenge, the questions and answers and any follow up actions.

If you have a standards and achievement committee (also called teaching and learning quality of education and outcomes committees) and they should be scrutinising the data in depth. They should ensure that they ask detailed questions about progress, outcomes and the curriculum. You should always ask about pupils in receipt of Pupil Premium, SEND pupils, those with an Education Health Care Plan, and Looked After Children<sup>14</sup>. There are some national statistics [here](#); information from the NSPCC [here](#); and there is a free to access role description for governors [here](#).

### **D is for Decision**

If the board is not making any decisions it is not being effective; and yes, sadly this happens. Decisions are made collectively and even if you wholeheartedly disagree with the decision made by the board you are bound by the code of conduct and the rules around confidentiality not to say so outside of the meeting. This is sometimes very hard. A good chair will allow everyone to express their opinions but may have to stop discussions if it is going round in circles. Some boards vote by a show of hands whilst others ensure consensus is reached in different ways. Whichever way the board decides something it should be consistent, and the outcome and context of the decision referred to in the minutes. Once a decision is made it must be recorded in the minutes and revisiting previously made decisions should only be done in exceptional or agreed circumstances. The chair cannot change decisions that are recorded in the minutes.



*Decisions should not happen in isolation of each other.*

Decisions can be categorised simply as;

1. Approve – e.g. a policy,
2. Adopt e.g. an approach or procedure,
3. Ratify -e.g. a decision taken elsewhere such as an appointment of a senior leader or if you are on a trust board the appointment of a chair of a Local Governing Board.
4. Resolved

You may find this opinion piece on [Making Effective Decisions](#) an interesting read.

### **D is for Deadline**

Sometimes it does not matter if a deadline slips but more often than not deadlines set by an external agency must be met. By using the action log you can ensure you meet any deadlines set by the board.

Remember there are also a deadlines for meeting papers. These should be available 7 days in advance; but be kind if this slips to 5 or 6 days on occasion.

<sup>14</sup> There is a very readable book called 'Young People on the Margins' by Loic Menzies and Sam Baars which you might like to share with your board.

## De is for De Facto Trustee

This is a person who is not validly appointed as a trustee but exercising the functions that could only be properly discharged by a trustee and Academy trusts should not have de facto trustees. This may have come about due to an error, omission or oversight in the appointment process of that trustee. Further information is available in the Academy Trust Handbook 2024.

## D is for Delegate

No one person should do everything. This particularly includes the chair!

Governors need to be professional in their approach but that does not mean you need to be ‘A Professional.’ The skills needed in and by schools these days are wide-ranging, but you must remember the difference between strategic and operational and this applies to delegating decision making.

A key document is the Scheme of Delegation which sets out what tasks are delegated to which levels of governance and which person e.g. the CEO. The terms of reference for committees are also a useful baseline document.

Delegation when done properly supports distributed leadership and succession planning.

You can delegate responsibility but not accountability. Discuss.

## D is for Delegated Powers

These are really important, and they should be used appropriately. It is best if you all refer to the Scheme of Delegation and always make sure that any actions taken by the Chair are those which have been delegated and that are allowed and capable of being delegated. There are certain matters which cannot be delegated e.g. approval of the budget, exclusions (unless an emergency) and permanently closing the school. Certain policies also cannot be delegated for approval. Everything should be minuted.

## D is for Deep Dive

This is a term from the current Ofsted Handbook and means that there will be a forensically triangulated investigation into anything within the curriculum that the information presented triggers. This blog post written by a former HMI is a personal view but worth reading <https://www.iabacus.co.uk/deep-dive-into-ofsted/>. Deep dives gather evidence of the curriculum within a certain subject, to build an understanding of the curriculum in the school as a whole. Things may change.

This [blog](#) however is written by Ofsted and offers important context.

The key thing to remember is that deep dives will be different in different schools and should not come as a surprise to governors if they have been fulfilling their duties properly.

This useful website called [Watchsted](#) is free to use and highlights all Ofsted inspection reports. You can search the website by sector and location.

## D is for Disaster Recovery Plan

Whilst we hope that disaster never strikes, we do need to be prepared if there is ever a serious incident. A DRP should form part of the school’s Business Continuity Plan and should detail how the school will operate and normal service be resumed. They should be kept under review and is one of those documents you do not need until you do.

### Top Tip

- Check your DRP for cyber security mitigation – this may be operational but governors and trustees do need to be aware of how the school or trust can ensure that it remains safe and open and secure in terms of cyber security.

## D is for Distributed Leadership

It is good practice to ensure that tasks and actions are distributed across the whole board. If there are committees these can and should be chaired by people other than the chair of the board. Distributing leadership helps with succession planning, shares the load across the board and is a more transparent way of governing. As a new governor you may not want to chair a committee but do bear this role in mind as you grow in confidence.

Part of effective distributed leadership is ensuring you have an effective succession plan in place. If you in an academy trust is there a risk identified on the risk register if the CEO or CFO is absent for any reason? If not it is worth considering.

## D is for Diversity

*‘Governors and clerks have a significant role in creating and maintaining an inclusive organisation where all can work, learn and reach their full potential.’<sup>15</sup>* Think about your own board and ask, ‘is it diverse’ and how do you know? If you are a member of the National Governance Association they have published some useful documents. Other organisations who can help are The National Black Governors Network, [Diverse Educators](#), and this [article](#) gives a corporate governance perspective.

Diversity matters when it comes to recruiting governors, engaging with stakeholders and asking questions. Another free read is available [here](#).

Diversity is a key part of the EDI or Equality, Diversity and Inclusion conversation. EDI is taking a higher prominence and many schools and trusts are undertaking detailed audits of both staff and governors as well as diversity across the curriculum. Some boards have nominated a governor to lead on this important area.

## D is for Due Diligence

If your school is considering joining an Academy Trust you will hear the term due diligence used a lot. Due diligence is about undertaking a systematic investigation into all aspects of the school including finance, governance, data, assets, staffing and any legal liabilities. Trusts undertake due diligence on schools, but it is good practice for a school thinking of joining a trust to do a little due diligence of their own.

Some best practice guidance for governing bodies of maintained schools, local authorities and academy trusts is available [here](#)

## E is for Early Help

Early help means providing support as soon as a problem emerges at any point in a child’s life, from the foundation years through to the teenage years and is not just about your early years foundation stage (EYFS) cohort. There is a whole section on Early Help in Working together to safeguard children guidance that you can find [here](#).

## E is for Effectiveness

Effectiveness is tested by self-review, self-evaluation and self-reflection. Effective meetings are important – 6 hours discussing the colour of the walls in the school hall is not the most effective use of anyone’s time. There are lots of toolkits available to help boards self-reflect on their effectiveness – a quick internet search will help, plus there are templates and toolkits available from subscription sites like the School Bus and The Key for Governors.

If you are in an academy trust there is a review tool for boards from the [Chartered Governance Institute](#).

<sup>15</sup> [Equality and Diversity and Governance.pdf \(aoc.co.uk\)](#)

## E is for Estates

Estates refers to the school buildings and grounds and the contents inside are called the assets. The DfE has recently published the [top 10 estate checks for Boards](#). Definitely worth a read but not easy to download.

Ensuring that the premises are safe and repairs done in a timely manner is something that governors and trustees should take an interest in. Some schools and trusts have specific health and safety/premises committees. These committees should have oversight of the H&S audits etc. Under the Health and Safety Act 1974 an academy trust, as an employer, is responsible for the health and safety of its staff, pupils, and any visitors. In a maintained school this is the Local Authority.

## E is for Ethical Leadership

The role of ethical leadership is becoming more widely discussed and you may be interested in this [article](#). You can download a report and framework on Ethical Leadership [here](#). You may like to suggest at some point, when the time is right, that your board reads the framework and you may also like to think about diversity and ethical leadership in the same conversation. This relates to the EDI discussions that could (should?) potentially be a specific agenda item in their own right.

## E is for Ethos, Vision and Values

In trusts, the purpose of governance is to provide:

- strategic leadership
- accountability and assurance
- strategic engagement

The core functions of the governing board include, but are not limited to, ensuring:

- that the vision, ethos and strategic direction of the school are clearly defined
- that the headteacher performs their responsibilities for the educational performance of the school
- the sound, proper and effective use of the school's financial resources

Your school will have a mission statement, and it may have a values statement and it will have a vision. As a governor it is perfectly legitimate to ask ourselves 'what impact does our vision have on pupil outcomes?' There is a saying which goes something along the lines of *values should be lived and not laminated* which means that values are more than just words but are actions and behaviours that we should live by every day.

Governors and trustees should participate in determining and agreeing the scope and content of the vision as well as monitoring it in practice. It is always interesting to talk to the pupils about the school vision – *do they know what it is and can they tell you what the values mean to them?* Visions and values do not need to be updated annually but they should be reviewed for continuing relevance, impact and implementation.

### Top Tip

- You may wish to add values to your agenda so that everyone has a quick reminder.

## E is for Equality

Schools and academies are bound by equality legislation just as they are bound by health and safety and employment legislation. You need to agree and publish your equality objectives and advice can be found [here](#).

The Ofsted documentation states quite clearly in respect of the Equality Act 2010 the following:

*The framework is intended to be a force for improvement for all learners. The framework and remit-specific criteria are clear that the expectation is that all learners will receive a high-quality, ambitious education.*

*Inspectors will assess the extent to which the provider complies with the relevant legal duties as set out in the Equality Act 2010, including, where relevant, the Public Sector Equality Duty and the Human Rights Act 1998.*

Remember to always consider the 9 protected characteristics.

**E is for Exclusion** – now referred to as school suspensions and permanent exclusions

It is really important that procedures for any pupil exclusions are followed to the letter. The DfE's [Suspension and permanent exclusion guidance](#) is not optional. The guidance states the decision to exclude a pupil must be lawful, reasonable and fair<sup>16</sup>. Schools have a statutory duty not to discriminate against pupils on the basis of protected characteristics, such as disability or race. Schools should give particular consideration to the fair treatment of pupils from groups who are vulnerable to exclusion. It is essential that you have read and discussed the school's Behaviour Policy<sup>17</sup> before you approve it as a board.

While the management of behaviour in schools is an operational role for the senior leadership team, governing boards have a statutory duty to consider certain instances of pupil exclusions and decide whether the decision should be upheld or the pupil reinstated. Considering whether or not to uphold the headteacher's decision to exclude is one of the most challenging and important roles that school governors and trustees have to fulfil, because it has significant implications for a child's education and potentially for the governing board's relationship with the headteacher and other school staff<sup>18</sup>.

#### Top Tip

- Make sure everyone on any panel has had some training in exclusions and suspensions based on the new guidance.

#### **E is for External Review**

There are a number of external reviews which are sometimes referred to during governor meetings these include;

- External reviews of governance: guide for schools and academy trusts
- Pupil Premium Reviews
- Teaching and Learning Reviews
- Special Education Needs and Disability Reviews
- Early Years Reviews
- Safeguarding and other audits
- Financial Audits, one example is this about finance and governance.

This is not an exclusive list. External reviews should be led by people outside the school or academy and are a good way of assessing effectiveness and can be commissioned by the board at any point. There are a range of reviewers including [IGovS](#), the NGA, CST and your Local Authority.

**External Reviews of Governance** should include conversations with all the governors including new governors – you may have a new and important perspective. With school budgets under increasing pressure it is worthwhile seeking quotes and being clear as to what you want the Reviewer to review. If you would like to commission a review think about

- What you hope to get out of the Review,
- How much you are willing to spend,
- The timescale and capacity,
- Who else needs to see the outcomes of the Review.

<sup>16</sup> There is some independent advice available here ([IPSEA](#)) [Independent Provider of Special Education Advice](#). Other providers are available. Also see Special Needs Jungle.

<sup>17</sup> Some schools give this policy another name so it is worth double checking

<sup>18</sup> NGA guidance – payroll



Most Reviewers take the approach of being *supportive yet challenging*. Sometimes it is good to have an external, impartial person asking questions about why your board is doing what it is doing.

An ERG or Pupil Premium Review (or often both) often used to be required following an Ofsted inspection if a school was judged as being Requires Improvement. This is no longer the case but this does not mean that these reviews are not an important and interesting way to help you move forward to success. ERG are powerful drivers of change.

### **E is for Evidence**

The use of evidence to make and justify actions and decisions is a key governance activity and helps answer the ‘*how do we know?*’ question. Evaluating the evidence presented by school leaders forms a major part of how governors and trustees discharge their responsibilities in relation to holding to account. The ‘*how do we know?*’ question is often followed by the ‘*so what?*’ question.

### **E is for Extra Curricular and Enrichment**

Finding out about the whole of the school day is really important. Ask about trips, clubs, excursions, sporting activities, music events etc; and always ask how and if the disadvantaged<sup>19</sup> and SEND pupils are accessing these activities. These activities are also known as extended school activities. If you attend these trips and events yourself in any capacity remember they are not governance visits per se but a fantastic way to listen to pupil voice and share in the life of the school.

**E is also for everyone, expectations, enjoyment** and all points in between...

Because ...



### **F is for Federation**

Some schools are in formal federations – these can be soft or hard federations. Federations are maintained schools and are not academies though the governance structure is a little similar. There are specific regulations about federations. This document from 2014 is about [governance in federations](#) and this is still valid.

### **F is for Feedback**

It is good practice to ask for feedback when you have done a governor or trustee visit. Feedback could be positive and negative and is a useful indicator of impact.

You may also ask about how teachers give pupil feedback – verbal or written – as this is a useful indicator of the extent and impact of the feedback or marking policy staff workload.

It is also a good idea to share some feedback on the training you have undertaken as well. Sometimes boards have this on the agenda and others have a simple form for you to fill in.

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<sup>19</sup> There must be a better word than this!



## F is for Finance

Every Trust and maintained school board needs to regularly review the school budget<sup>20</sup>. This is not easy. Budgets are under increasing pressure and governors and trustees are often at the forefront of making difficult decisions about how school budgets are allocated. Governors and trustees must make sure that they have full oversight of the school or trust finances at least 6 times per academic year.

It is really important that governors remain strategic when discussing finance and leave the detailed operation and management of the budget to the Headteacher and School Business Leaders although that you do need to understand the nitty gritty. Balance is everything and asking questions about finance is part of discharging the third core function of governance.

There are a number of finance policies (there are quite a number) which are mandatory and which governors and trustees need to read, review, and ratify these on a regular basis. Some of these policies can be delegated to committees and some cannot. A list of policies which cannot be delegated can be found [here](#). This list is an excellent starting point [statutory policies for schools and academy trusts](#). These get updated regularly.

It is really important that you know which finance policy approval you can and cannot delegate and understand which decisions can be delegated to a person and those which cannot. If you do not know you may well get into a bit of a mess. It is also a very good idea to have a finance committee/working party to undertake this role for any finance related policies. It is not good practice just to have one person do this so you really need to make sure your meetings are quorate. In an academy this will be set out in the Scheme of Delegation and/or the terms of reference.

You may also like to consider [benchmarking](#) your school against similar schools. If you do this well you may well save money, and even if it does not it will give you some good questions to ask. Benchmarking is not a solution in itself but is a tool in your governance armoury and offers a good place to start shaping and focusing your lines of enquiry. The other thing that you must always do with finance meetings is make sure that you minute them properly as an auditor may well check. You do not need to be a financial whiz kid to be a member of the finance committee so do not be put off.

In a maintained school you have to complete the Schools Financial Value Standard which is an audit tool and can be found [here](#). In an academy you have to follow the financial reporting requirements of the [ESFA](#).

It is important to understand how your school or trust is funded. Schools get two main streams of money from the Government. Their core funding – known as revenue funding – is the money that is spent on running costs, like salaries. They then have capital funding which is for buildings (see B is for Budget).

All state-funded schools, whether they are academies or council-run schools, get their funding from the Government. Independent or private schools operate outside this system and raise their funding through fees<sup>21</sup>.

## F is for Foundation Governor

If you are governing in a church school a number of the governors will be Foundation Governors appointed by the Diocese or local parish. They are the same as the other governors in every way but they have to ensure that the ethos and values of the church are celebrated, shared and monitored. The number of Foundation Governors is carefully prescribed in the Instrument of Government or Articles of Association. In a VA school the chair should be a Foundation Governor unless there are very compelling reasons why this cannot be the case. Always seek advice from the clerk or Diocese. Sometimes they are called Church Governors.

<sup>20</sup> If you are a local academy committee or LGB – check your Scheme of Delegation – not all Trusts delegate finance. However, you should be asking questions about impact of the budget on outcomes, staffing etc and how the school uses external funds such as pupil premium.

<sup>21</sup> [How does school funding work and how does the Budget affect it? – The Education Hub \(blog.gov.uk\)](#)

## F is for Free Schools

All schools except independent schools are free at the point of use. A free school is a school set up by an organisation or a group of individuals, funded by the government but not controlled by the local authority. Free schools still have governors. They are still inspected by Ofsted. The DfE describe Free Schools as follows:

Free schools are ‘all-ability’ schools, so cannot use academic selection processes like a grammar school. Free schools can:

- set their own pay and conditions for staff,
- change the length of school terms and the school day.

They do not have to follow the national curriculum although most do.

## F is for Funding Agreement

The [agreement](#) between the academy trust and the Secretary of State, including funding arrangements, obligations and termination provisions. It is unlikely that this agreement will come up at meetings often but if it does it is important to pay attention.

## F is for Further Education

If you are a governor at an FE college there is lots of useful information on the Association of Colleges website. This [link](#) is really useful and all governors might find some of the documents an interesting read. If you clerk in the FE sector the AOC has some really useful resources which you can download and save.

## G is for GDPR

GDPR stands for General Data Protection Regulations and you can find some key useful information [here](#). The need to comply with GDPR is not going to go away and is all about data protection – including yours. It is not the role of the governors to be the Data Protection Officer as there may be a conflict of interest plus it is very operational activity, but governors need to make sure there is someone doing this role. Many schools now require governors to have a school email address and to always use it for school matters.. You will need to regularly ask about data breaches.

Remember you do not ever need to see any document with pupil names on it – this includes in the Headteacher’s Report to Governors, data tables and link reports referring to pupil voice. See also Single Central Record. The only exceptions are disciplinaries and awards. You should never see individual grades or personal data such as staff salaries.

### Top Tip

- If you are part of a WhatsApp group or similar please remember to respect confidentiality, do not agree to make decisions outside of the board meeting and remember people can and do take screenshots. Your school or academy will also have a social media or acceptable use policy that is signed by staff but which also applies to governors and trustees.

## G is for Get Information About Schools (GIAS)

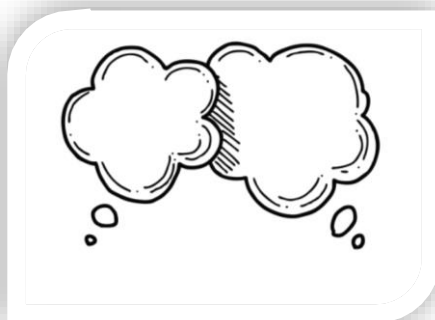
GIAS used to be called Edubase. Once you are a governor (or trustee) your name will be published on this [website](#). Governing is a responsible role and so we should know who is doing this important job. If you are a Trustee your details will also be published on the Companies House website as well. GIAS requires the name of the chair to be identified.

Keeping GIAS up to date is important (and is usually the responsibility of the clerk – governors should not have access to update GIAS) so it is not the role of the governors to actually do the updating. They should regularly check that the data held about them on GIAS and the school website is correct. It is your responsibility to keep this updated by informing those to do the updating.

Perhaps you could have a governor reviewing GIAS on a regular basis to make sure it is up to date?

## G is for Groupthink

Groupthink is the practice of thinking or making decisions as a group without individuals challenging the consensus and this can result in poor-quality decision-making. One of the signs of groupthink is a deficit of challenge, where no one asks questions or queries the status quo. You can read a little about group think [here](#). The article suggests that in order to minimise the effects or impact of a groupthink that *it is critical to allow enough time for issues to be fully discussed, and for as many group members as possible to share their thoughts*.



Have you ever witnessed a groupthink on your board?

It is important that, if possible;

- consensus is reached when making decisions;
- there must be enough time given to allow free and frank discussion to take place,
- there is a well prepared agenda that supports and guides discussion and is shared in advance,
- boards led by experienced chairs.

## G is for (own) Goal

Own goals can be easily avoided. Here are some top tips boards can employ to avoid own goals;

- Ensure the meetings are quorate, agree dates in advance, and if you cannot attend let someone know as soon as possible as meetings can often be re-arranged.
- Make sure you get your papers on time from the clerk. If they do not arrive within 7-10 days of the meeting – say something. Please note that there may be a reason for the delay that is beyond the clerk's control.
- Having to read 20+ policies at once is not good practice and lots of schools use a spreadsheet style management system.
- Ensure that the terms of office for governors do not expire without you noticing - keep a check of the date you started in case everyone else forgets, sadly this happens. Also keep a record of the date you do any safeguarding training for the same reason,
- Make sure your minutes are accurate and reflect your discussions and read them as soon as they are sent to you. If you disagree with the minutes please discuss this respectfully. Do not get hung up on a missing comma but rather focus on ensuring that the decisions are correct and the actions are attributed correctly.

## G is for Going Concern

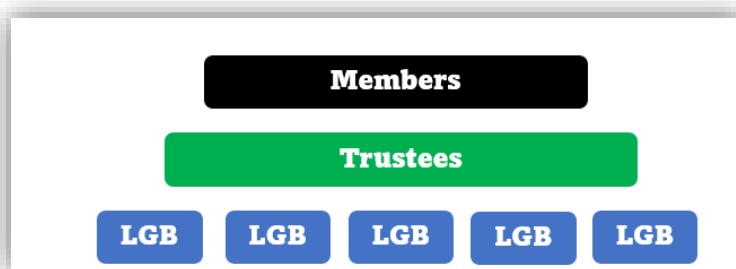
Simply put the term, 'going concern' is a view taken by the ESFA for example as to whether or not an academy trust will have sufficient funds to pay its obligations, such as payroll, trade creditors, and forth, as they fall due, over at least the next 12 months from the date of approval of the financial statements.

[This](#) is a good read especially if you are a new trustee. Annex 9 of the guidance (on financial challenge issues for academy trustees) is a useful checklist of questions to ask if you are on the trust's finance committee.

## G is for Governor

This word can be quite confusing. In maintained schools governors are called governors. In academies at school or local level they can be called governors, committee members, representatives, advisors, and councillors. In an academy trust the responsibility for governance is at the trust board level.

Imagine if you will, a 3-layered cake. The bottom layer is the local level – your school; the middle layer is the Trust Board; the top layer are the Members. These boards should not all be populated by the same people but there is often overlap between the layers. Over time there should not be any overlap as the DfE are becoming more stringent about ensuring that there are transparent governance arrangements. The chair of trustees may also be a Member as this can help with communication and information sharing.



Sample structure

Each governance layer has different responsibilities as set out in the Scheme of Delegation. The Academy Governance Guide is a good place to start and has some helpful descriptions about what each layer should do. It is essential that there is a communication plan to show how each of the layers is expected, and required, to communicate with each other.

Some Trusts have removed Local Governing Boards and replaced them with a different structure. Make sure you know what your structure is and where the decisions are made and where you sit in the structure.

Remember some governors are elected – staff and parents, and others are appointed e.g. co-opted and Foundation. These will be laid out in your constitution document (in a maintained school this is called the Instrument of Government and in a trust as outlined earlier in The Glossary there will be information in the Articles of Association as to how the local layer of governance is constituted).

If you are a parent governor you can be on a performance appraisal panel and you should not be asked to leave a board meeting just because you are a parent (unless for example there is a potential conflict of interest). If you find yourself in this position ask the clerk for advice. It is also not appropriate for staff to be on the head's performance management panel or for the School Business Manager who happens to be the staff governor to be the chair of the resources committee or take the minutes because they know the most about finance. Sometimes it is important to state the obvious.

You can be a governor at more than one school. Lots of people do. Just remember where you are if you do!

## G is not for Guess

In order to avoid guess work (although there is often a place for a good guess) being prepared is the best antidote. Guessing the outcome of a decision is risky and looking for realistic and creative solutions is sensible especially in the shifting sands of funding, price rises and uncertainty that many if not most schools face in the coming academic year.

## H is for Headteacher (this can include the CEO)

These days not all schools have a Headteacher or Principal, some have Heads of School. These roles have different responsibilities although from the pupils' perspective they are not different. There may also be Assistant or Associate Headteachers.

As a governor or trustee you have a duty of care towards the wellbeing of all staff, particularly the headteacher. Expecting your Headteacher to answer emails at 11.00pm is probably not good for their wellbeing or yours, and neither is expecting your headteacher to attend a governing board meeting every Tuesday evening from 6.00 pm to 10.00 pm. Also, expecting them to have all the answers to all questions at their fingertips every time you ask adds additional and unnecessary pressure and although they may well have all the answers it would be nice to give them the time to find the answer.

If you are a new governor it is always a good idea to pose your questions through the chair in the first instance although this depends obviously on the nature of the question.

### H is for Headteacher's Report

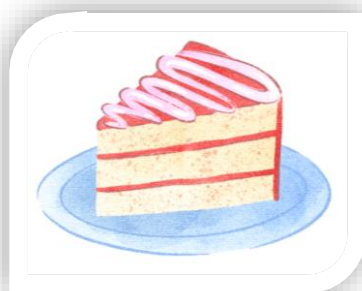
Most Headteachers prepare a regular report to governors. These vary in both quality and length. Length as such does not really matter (apart from the fact they take a long time to prepare) as long as they contain the information governors want and need to know and are not just what the Headteacher wants to report on. Whilst it is up to governors to decide on the content it is really important to be reasonable in all your requests for information and base these requests on genuine and relevant curiosity. Always try to read the Headteacher's Report before you go to the meeting. Some boards have a Senior Leaders Report instead and this is prepared jointly by the senior leadership team; including the School Business Manager for example. However, if the Headteacher's Report is 80+ pages, in full colour with lots of data in a 10 point font it may be worth asking about their wellbeing. No, in fact it is essential that you ask...

#### Top Tip

- In terms of Headteacher Reports – try to think *less is more*. Governors should not expect to be spoon fed both the questions and answers by the Headteacher.

### H is for Happy

Whilst governing is challenging it should also be enjoyable. There is no shame in admitting we enjoy the meeting. Cake and biscuits at meetings are always optional obviously but are a small gesture in the overall scheme of things. Governing in school is an act of service but it should not constitute your whole social life.



### H is for HR

In an academy staff are employed by the Trust and not by the Local Authority. There are sometimes difficult decisions to be made. It is always good practice to seek external advice when dealing with HR matters. If you are new governor with HR expertise please do offer support but remember the boundaries. Your LA teams will be able to help.

Some boards have staffing or personnel committees and these will have clear terms of reference. Personnel meetings should preferably be clerked by someone who is not an employee of the school – this will avoid any conflicts of interest or loyalty – although this is not always feasible.

## I is for IEB

An IEB or Interim Executive Board is a small (usually less than 5) people appointed on a short term basis by the local authority to ‘turn around’ a school which has been judged as being in urgent need of support and improvement. An IEB replaces the governing board and may or may not involve existing governors. IEB are often put in place when schools are judged to be in special measures by Ofsted. The DfE has specific [guidance](#).

Sometimes academy trusts put IEB or equivalent into schools to bring about change quickly. These are sometimes called Interim Management Boards. IEB/IMB minutes are not usually public though summaries or shortened versions may be available. This is not because IEB does not want to be transparent, it is just that the conversations are often related to personnel and should not be discussed in public. These boards are sometimes populated by trust employees which may not always be good governance but certainly brings focused attention. Sometimes they are populated by other CEOs and again it is important to manage and mitigate any conflicts of interest.

## I is for Impact

Impact can be both positive and negative and is worth double checking you are having an impact on a regular basis. Do not worry too much at first as new governor if you are not seeing much impact – this will become more evident over time.

Some boards end their meetings with a short discussion about impact or take a moment to reflect. This is a good way to end a meeting and can lead to some interesting and diverse discussions. Some chairs use a ‘*what went well*’ and ‘*even better if*’ approach. Some follow up after each meeting with each governor – where do they find the time?!

## I is for Implementation

It is a really good idea to do what you say you are going to do, check that you can afford to do what you have agreed to do and that you give yourselves enough time to complete the task. It is also acceptable to take a breath and pause – taking time for reflection is a good evaluative tool. Always ask who is going to what and by when. If you do not ask “why?” you may make inappropriate decisions.

### Top Tip

- Use the Action Log to help shape your discussions.

## I is for Information Governance

This is a term which schools are discussing much more since the introduction of GDPR. IG is a process which sets out your structures, policies, procedures and controls around decision making; covering everything from risk, governance decisions, and confidentiality. It allows schools to ensure that information is processed securely, legally and efficiently. It may not be something boards discuss often but we should be aware of the role of IG and governors need to follow the school’s IG protocols. Your school should have guidelines and if not it might be worth asking. The principles of information governance are the basic tenets of information and personal data security and this is closely linked to GDPR. Remember your minutes should be kept for at least 10 years.

## I is for Induction

All governors should receive induction, but it is not currently mandatory. Perhaps it should be? Has your school written a policy or procedure for new governor induction? Induction can take many forms. You should receive lots of information about the school – e.g. pupil cohort information, the last Ofsted report, a governor email address, staffing structure (a who’s who), who the link governors are and that all important list of acronyms! You may be sent on some induction or ‘welcome to governance’ training. In school your induction is usually led by the chair or vice chair. You may be offered a mentor or buddy to help you with your first few months. You should also be offered a tour of the school(s) – this is useful as it helps you to picture the school

in your mind when you are discussing Y4 or the geography department. You may have a school based induction about safeguarding as well.

Perhaps reading this glossary could count as induction?! Do let me know!

### **I is for Instrument of Government**

In a maintained school<sup>22</sup> the structure of the board is set out in a legal document called the Instrument of Government. The IoG states the name of the school, any religious designation, the number and type of governors on the board. In a faith school the IoG needs to be approved by the Diocese as well as the Local Authority. In a maintained school the board must consist of as a minimum:

- Headteacher – only the Headteacher can be the Headteacher governor,
- 2 parent governors – elected by their peers,
- 1 staff governor – elected by the staff,
- 1 Local Authority governor – appointed by the LA on the basis of skills but on the recommendation of the board,
- A number of co-opted governors appointed by the board.

In a faith school there will be foundation governors as well – usually making up 33% of the board in a voluntary controlled school and 50%+ in a Voluntary Aided school. Also, only 33% of the board can be staff members irrespective of their category. Your clerk will be able to advise you on how this works in practice. There are also regulations about how many hours a person can work in school if they are a parent governor.

Some trusts have similar structures to maintained schools but some have 2 staff governors (one teaching and one support staff). This will be set out in their Governance Handbooks and Articles of Association.

### **J is for Just**

There is **no such thing** as *just* a governor. We all have a level of responsibility and just turning up for meetings three times a year is no longer acceptable; especially if we are just turning up for the biscuits.

### **K is for KCSiE**

KCSiE stands for **Keeping Children Safe in Education** and this is updated at least annually. There are a number of other documents linked to KCSiE which are worth reading.

Please do not take any shortcuts when reading KCSiE; it is too important to take short cuts.

You may also want to read [Working together to safeguard children 2023](#) which complements KCSiE and covers a range of other duties.

KCSiE is an essential read for all governors and reading it is as non-mandatorily mandatory as you can get. You will need to have read and understood KCSiE and signed that you have done so. The fact that you have confirmed that all have read it needs to go in minutes.

### **ID and school visits**

You will expect to sign in every time you visit school. You may be given a photo ID badge and it is important to remember that you need to wear this, or a visitor's badge, every time you visit school. You should always make an appointment, unless you are invited, if you are going to visit school to ensure that it is convenient. Sometimes the ID badges will have your DBS number printed on them. Be careful what else you have printed on the badge – if you are the link governor responsible for disadvantaged pupils you might not want that printed on your badge for all to see.

<sup>22</sup>[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/640562/The\\_constitution\\_of\\_governing\\_bodies\\_of\\_maintained\\_schools\\_2017.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/640562/The_constitution_of_governing_bodies_of_maintained_schools_2017.pdf)



Another useful link is [this](#). It is about the designated teacher for looked after and previously looked-after children and is not governance per se but a good read nonetheless.

### K is for Key Stage

The national curriculum is split into several key stages as set out on the table below. You will be given information on outcomes and progress and headline figures on these key stages. This may change so watch this space.

Child's age	Year	Key stage	Assessment
3 to 4		<a href="#">Early years</a>	
4 to 5	Reception	<a href="#">Early years</a>	Teacher assessments (there's also an optional assessment at the start of the year)
5 to 6	Year 1	KS1	Phonics screening check
6 to 7	Year 2	KS1	National tests and teacher assessments in English, maths and science
7 to 8	Year 3	KS2	
8 to 9	Year 4	KS2	Multiplication Times Tables test
9 to 10	Year 5	KS2	
10 to 11	Year 6	KS2	National tests and teacher assessments in English and maths, and teacher assessments in science
11 to 12	Year 7	KS3	
12 to 13	Year 8	KS3	
13 to 14	Year 9	KS3	
14 to 15	Year 10	KS4	
15 to 16	Year 11	KS4	GCSEs

### K is for Key Line of Inquiry

KLI are always increasing in prominence. You may hear Ofsted mention KLI – these are the lines of inquiry which they will be looking specifically at during their inspection and are based on data in the public domain (your school's historic results for example), any complaints made to them, [Parent View](#) information, and any information given to them by the Local Authority or trust. If Ofsted have a KLI they may choose to do a deep dive into that subject area.

### K is for Knowing Your School

Try and visit school regularly and keep a record of when you do visit. Remember that not every visit is governance and some visits are just that - visits. See also link governor below. If you cannot visit school during the day – do not panic. There are lots of ways you can be an effective governor without visiting during the day just make sure one or two people on your board can.

### K is for Key Performance Indicator

At their most simple KPIs are a measurable value that demonstrates how effectively an organisation or individual is achieving specific objectives. KPIs are used to track progress toward strategic goals, offering insights for decision-making and performance improvements across various different areas; increasingly these include governance. They should help you achieve your vision.

### L is for Leadership

Ofsted judge governance as part of the Leadership and Management element of an inspection. If you have time read a few Ofsted [inspection reports](#) – they make interesting reading. You do not want to be on the receiving end of this type of comment *relationships between leaders in the school and those who are*

*responsible for governance have completely broken down. Leadership is dysfunctional<sup>23</sup>. Or this over time, governors have not ensured that they have the knowledge to hold leaders to account for the quality of pupils' education. They have not equipped themselves with the skills needed to provide supportive challenge to improve standards. This has slowed the school's progress in moving forward.*

#### Top Tip

- There are a myriad of books written about leadership – why not pick one at random and use it as a starting point for discussion!

#### L is for Link Governor

A link governor or trustee is someone who takes special interest in a particular topic.

Having a link governor for safeguarding is essential but unless you have experience of safeguarding or have been a governor for a while, agreeing to be the safeguarding governor at your first meeting is probably not a good idea. It is a very responsible role. You also need a SEND governor.

Most trusts have a safeguarding trustee as well as safeguarding governors in the individual academies and it is good practice that these people get together at least termly to talk about common issues affecting their academies.

Link governors often used to be attached to subjects such as literacy, maths and music however many governing boards are now moving towards linking governors to the objectives in the School Development or Improvement Plan. Faith schools will also have a link governor for collective worship and RE. Some boards do their link roles in pairs or small groups. In some Trusts Trustees are linked to individual academies; this helps with oversight and communication between the layers of governance.

The benefits of having link governors includes;

- sharing the workload,
- improving the knowledge of the whole board.

It is important that if you do a link visit that you keep a record or write a report (your school should have an agreed template or report form or template which you should use). Unfortunately, these reports need to be a little more in depth than *'I had a lovely time in Year 3' or 'the school dinner was very nice.'* This type of information is good to know of course but does not demonstrate the impact of your visit or your own learning or reflections. You do not need to write War and Peace in a link report or prepare a pedagogical discourse on the depth and content of the history curriculum. In fact, if you are discussing pedagogy<sup>24</sup> as a governor you are probably in the wrong meeting – although the new Ofsted Framework has a much greater focus on curriculum so we all need to know much more about how curriculum is delivered in schools.

At all times remember that link governors are not doing, and must not ever, ever do lesson observations.

Things to think about...

1. What link roles do you have now? [statutory, school, Trust]
2. Why have you chosen those roles as a focus?
3. Are the right people in the role?
4. How did you choose them?
5. What training is available?
6. Have they the capacity to do the visits?

<sup>23</sup> Kirkby College Ofsted Jan. 2018 – sadly there are many other more recent examples out there and Westfield Primary School Wolverhampton 2024 is just one of them.

<sup>24</sup> A definition is available here <https://en.oxforddictionaries.com/definition/pedagogy>

## M is for Master Funding Agreement

The funding agreement provides the framework within which your academy or free school will operate. Information can be found [here](#). There are also supplemental funding agreements. As a new governor you do not need to worry about the MFA but it is useful to know how academies are funded.

## M is for Members

As mentioned earlier in The Glossary it is helpful to think about the academy governance structure as a layer cake. The top layer of the cake are the Members<sup>25</sup>. In the past there used to be a minimum of 3 members in each trust, now the minimum is 5. Members have powers such as the power to remove an ineffective elected trustee. All academy trusts, as charitable companies, have both trustees (sometimes they are called directors because as well as being charitable companies, academies have to adhere to company law as well) and Members.

Members also appoint the trust's auditors on the recommendation of the trust board and receive the trust's annual audited accounts. It is also worth noting that employees of the trust cannot be appointed as members. Trustees should not be employees either, in an ideal world anyway, as this could be seen as them *'marking their own homework.'* Saying that this is sometimes allowed by the Articles of Association.

The National Governance Association publishes a useful guide for Members and there is important information on this key layer of governance in both the DfE Governance Handbook and the Academy Trust Handbook.

As a new governor you will probably have very little to do with the Members but is it good to know what they do.

## M is for Meetings

Some boards have lots of meetings. There is no right or wrong number of meetings but meetings for the sake of meetings is not a good idea. Any conversation about the school between two or more governors is probably a meeting and a record should be kept even if you do not take formal minutes. Governing during the pandemic brought the role, purpose and organisation of meetings into sharp focus and many boards decided to continue to hold some meetings online. This is good for the planet!



Most boards must meet a minimum of 3 times per year (unless they are meetings of Members of the Academy Trust then they only need to meet once but they are increasingly meeting more often throughout the year).

Some boards meet once per half term and most boards have committees or working parties/groups (or task and finish groups). Whichever model your board uses, make sure you have seen the terms of reference for the meeting so you know what they are supposed to be talking about. All governors can have sight of all minutes

<sup>25</sup> The NGA have published useful advice here <https://www.nga.org.uk/Guidance/School-structures-and-constitution/Academies-and-free-schools/NGA-Guidance-the-role-of-members.aspx>

apart from the confidential ones<sup>26</sup> as these are for the people at the meeting. There are times when it is good not to know what was discussed in case you need to attend an appeal or disciplinary committee.

If you hold online meetings you need a protocol so everyone understands the rules and expectations.

### M is for Minutes



Minutes have many uses and not just to remind us about;

- what happened at the meeting,
- who attended, and
- what decisions were made by whom and when.

They are also used by Ofsted to gauge effectiveness; by auditors to check whether you have actually approved what you should have approved when you should have approved it; and by anyone doing an External Review of Governance. They are public documents. They should be accurate, grammatically correct, a true reflection of the meeting and include any disagreements impartially. They should record actions, questions, challenges and successes. They should make sense to anyone who was not at the meeting. The confidential elements of any governing board meeting should be clearly signposted as such. Minutes should be kept in perpetuity (or at least an agreed period of time in line with the school or trust's Record Retention Policy) and not with the only copy kept in the clerk's shed. True story.

Some boards like to have individual governors questions identified with names or initials; some do not. There is no right or wrong way of taking minutes **but** they should be consistent.

All boards need to appoint a clerk. In an emergency a governor can take the minutes – this means anyone except the Headteacher; the regulations (relating to maintained school is [here](#)).



There is a useful blog on how to write effective meeting minutes [here](#) (although not specifically related to governing board meetings).

<sup>26</sup> This is a 'rule of thumb' – each board is different but there are certain minutes which not all the governors need to see. Ofsted can inspect confidential minutes.

Minutes should be kept for at least 10 years.

### **M is for Multi-Academy Trust**

Colloquially known as MATs, Multi-Academy Trusts have been around for some time and they are schools that operate outside the control of the Local Authority. A MAT, now more commonly referred to as an academy trust, is a group of schools<sup>27</sup> working in collaboration as one entity to improve and maintain high educational standards. The emphasis in that sentence is on *one entity*. All Trusts have trustees (sometimes they are called directors). Ideally speaking trustees should not automatically be the chairs of the Local Governing Boards as these roles are appointed on a skills and knowledge basis and not because they represent the local schools. This situation leads to a lot of heated debate!

Some MATs are Single Academy Trusts (also known as SATs) and have only one school. There are still a few empty MATs around but these are less common.

If your school is an academy you may find the [Confederation of School Trusts](#) a useful organisation to join (you cannot be an individual member).

### **N is for National**

The word national is used in terms like National Leader of Education and National Leader of Governance (NLG) and in National Professional Qualifications [National Professional Qualifications](#) – which are the professional qualifications undertaken by school staff. You may hear these terms during meetings. NLG<sup>28</sup> for example often supported schools by undertaking External Reviews of Governance, and until August 2021 by also supporting heads and/or chairs by offering free mentoring. This has now been replaced in part by IGovS and there are no longer any formally designated NLGs.

When asking questions about outcomes data you are encouraged to compare your school to national and not just the local outcomes. This is because your local area's outcomes could be well below the national average and being above local is not necessarily as good as it looks. However, remember when looking at data **context is everything**.

### **N is for NASCC**

The National Association of School and College Clerks was formed *by clerks for clerks* and is a growing network providing support for those working as clerks and governance professionals in school and academy settings. NASCC offers both free and paid for services, conferences and webinars and further information is available [here](#).

NASCC also publishes a newsletter called the Clerks' Chronicle which showcases some of the work that clerks do – often behind the scenes. Please do let your clerk know about NASCC!

Your board can also advertise clerking vacancies via NASCC.

### **N is for Networking**

Networking with other governors is a quick and easy way to share learning, meet other governors, and keep up to date. Networks may be offered by your Local Authority or trust but there are lots of governor networks on the internet which you can join in with e.g. on Twitter or Facebook – just remember that not everything you read on the internet is true!

### **N is for No-show**

It is always advisable (and good manners) to send your apologies in advance if you cannot attend a meeting for any reason to both the chair (and the clerk for good measure). Governor attendance must be published on

<sup>27</sup> Some MATs are what is known as Empty MATs i.e. they are set up as a MAT but only have one school. These are decreasing in number.

<sup>28</sup>

the school website. Apologies do not have to be accepted but any that are received must be noted in the minutes. If you are no show and no apology for 6 months you may well be suspended from the board<sup>29</sup>.

You can also be a *no show* even when you are present in a meeting. This type of *no show* happens when you do not ask any questions, participate in the meeting, or offer to do something. Being a no show is not really fair on the other governors who may well be doing all the work. If you are struggling for any reason do please ask for help and support from others on your board; if you feel you cannot ask the chair approach the vice chair or clerk. You can get external support from closed social media groups such as School Governors UK on Facebook, Direct Messaging other governors, trustees or clerks on Twitter or by asking the chair or another governor on your board for advice (always remember confidentiality). The headteacher or CEO will also be able to advise as well but remember they are busy people.



### **O is for Obvious**

Sometimes we cannot see the wood for the trees especially if we have been governing for a long time so please do ask the obvious questions. You will not be alone in wanting the answer!

### **O is for Off Rolling**

A House of Commons Briefing Paper published in January 2019 on off rolling opens with the following statement - *there are many reasons why children might be removed from the school roll, from moving home to permanent exclusion following disciplinary action. In recent years, however, concerns have been raised about children leaving the school roll for other reasons, for example to 'game' the school performance system, or to relieve financial pressure on schools. Children who are removed from school for these reasons, perhaps through exclusions or parents withdrawing them from school for home education, are commonly said to be 'off rolled.'* Off rolling remains a particular focus for Ofsted and you may be expected to answer questions about any changes in your Number on Roll. The report can be found [here](#).

#### **Top Tip**

- You may also want to ask about the number of pupils on part- time tables, how internal truancy is managed, lateness and punctuality. You don't need to know pupil names.

### **O is for Ofsted**

Ofsted is the Office for Standards in Education, Children's Services and Skills. Ofsted inspect and regulate services that care for children and young people, and services providing education and skills for learners of all ages. Ofsted do not just inspect schools. You can find out more about the Ofsted Handbook (updated for September 2024) [here](#). Ofsted have reviewed the handbook recently and may do so again as the year progresses so do try and keep up to date with any changes if your school is due inspection. Your headteacher will be able to help you.

<sup>29</sup> In maintained schools this is the legislation <http://www.legislation.gov.uk/ukxi/2013/1624/regulation/17/made> and in a MAT it should be covered by the code of conduct or equivalent.  
When in doubt ask...

It is also a good idea to read the last Ofsted report on your school and be aware of when the next inspection could potentially take place.

Boards are not governing for Ofsted. This does not mean that Ofsted is not important; what it means is that whilst boards need to be fully cognisant of the requirements of Ofsted they should not let it be their sole driver.

Ofsted have published a number of [myth busters](#) which are worth reading. They also publish a series of surveys, blogs and reports which you can find on their website. Reading some of these is useful CPD.

Inspectors evaluate schools against the following key judgements: para 224

- quality of education
- behaviour and attitudes
- personal development
- leadership and management

Where appropriate, inspectors also evaluate schools against the following provision judgements:

- early years provision
- sixth-form provision

Ofsted also expects schools to meet the requirements of Keeping Children Safe in Education and if you are the safeguarding link you may find paras 329 to 412 of particular interest. Ofsted defines ineffective safeguarding as *'serious or widespread failures in the school's safeguarding arrangements' and will always place a school in a formal category of concerns*. You can sign up for a free independent safeguarding briefing from Success In Schools Ltd – just subscribe via their website. Other providers are available of course!

Ofsted's approach to evaluating the curriculum is set out in paragraphs 234 to 273<sup>30</sup>. Spending time reading the handbook is time well spent but don't get too stressed about having to know all the contents– you are not alone and as governor it is unlikely that you will be needed to talk to Ofsted on your own.

### **O is for Outlier**

In statistics, an outlier is a data point that differs significantly from other observations. An outlier may be due to variability in the measurement or it may indicate an error. An outlier can cause serious problems in statistical analysis. When you are asking data questions, always ask about outliers – there may be some interesting case studies from which we can learn. Small cohorts are a particular issue.

Think – what stands out?

### **O is for Oversight**

Governors need to have oversight. They should not be discussing operational matters but need to be aware what the operational matters are so that there is no 'boundary crossing.' Your introduction to governance training will go into this in more detail. We also need insight, hindsight and foresight though the latter is not always easy unless as you can see round corners. Being prepared helps.

We also need to have foresight, hindsight and insight as well! And relax...

### **P is for Pecuniary Interest**

School governors and trustees must declare any business or financial interests that mean they could benefit personally from any of the decisions they make at the school. In both maintained schools and academy trusts the governors or trustees must leave the meeting room when there is a discussion relating to their business interest and they are not allowed to vote on the subject. This should be recorded in the minutes and any mitigation noted.

<sup>30</sup> [School inspection handbook - GOV.UK](#)



Maintained school governors<sup>31</sup> must declare (and this must also be published on the school website)

- governance roles in other educational institutions;
- any material interests arising from relationships between governors or relationships between governors and school staff (including spouses, partners and close relatives).

The Academy Trust Handbook sets out the same transparency of reporting arrangements for trustees and those at the local governing layer.

You might find this [blog](#) offers some food for thought.

### **P is for Performance Management and Appraisal**

Governors and trustees need to have an understanding of, but not the detail about, performance management of the staff in the school.

In terms of the Headteacher's and CEO's Performance Management those governors undertaking this activity should have undertaken training, should really appoint an external advisor, and invest time into preparing for the meeting. The outcome of the appraisal needs to be minuted as having taken place but not the detail of the discussion. As a new governor you may not be part of this process but you can ask if the Head has a wellbeing target for example and whether the targets set have been met. Some Headteachers are happy to share their targets with all governors and some are not. Again, it is not mandatory that they do.

In a maintained school you need to have a Pay Committee. Parent governors can be part of this but not staff governors for obvious reasons.

The DfE publishes some useful guidance on appraisal and you can find the model policy [here](#).

Academy Trusts usually have a pay committee or a remuneration committee; if you are a new trustee it is important to understand how pay decisions are made. There may also be an executive pay policy (this could also be part of the Trust's Pay Policy).

It is worth trying to find training on performance management and appraisal if you have not done any before. The National Governance Association<sup>32</sup> offer some free webinars as do other providers so it is worth investigating.

### **P is for Persistent Absence**

As well as asking about attendance and lateness governors should also be asking about the number of pupils who are classed as persistently absent. If you are interested this is a useful document - [A guide to absence statistics](#).

Some useful background is available [here](#) and the headline facts and figures from this document for the last academic year but provide a useful benchmark. You may also find **Working together to improve school attendance** a useful read; it was last updated in August 2024. Chapter 3 is the key section: expectations of academy trust boards and governing bodies of maintained schools.

### **P is for Policy**

It may be an understatement to say that there are a lot of policies in schools. Some of these are statutory and can only be ratified by the full board, and some are protocols masquerading as policies. Some policies governors do not need to read but merely know exist – these are usually operational policies. Once a policy exists it needs to be monitored and boards can do this in different ways. Managing policies is the job of the school. The clerk is the policy gatekeeper in that they should be helping filter policies between the school and the board.

<sup>31</sup> [The constitution of governing bodies of maintained schools](#)

<sup>32</sup> [Impactful executive leader performance management | National Governance Association \(nga.org.uk\)](#)

It is not your role to write policies even if you are expert at policy writing but you may be able to offer guidance if asked. Remember most policies are operational and some are masquerading as protocols. At its most basic a policy is the *what* and why and a protocol is the *how*.

These hyperlinks are a very good place to start as they set out lists of statutory policies for schools and academies. These are minimum requirements and do sometimes change – you also have to comply with a whole range of other legislation such as the Health and Safety at Work Act and the Equalities Act.

- [Statutory policies for maintained schools](#)
- [Statutory policies for trusts](#)

Remember all policies need an adoption and review date. This is really important.

### **P is for Professional**

Governing boards need to approach their work in a professional manner. Meetings need to have an agenda, a chair, a clerk and a focus. There is no dress code but being on time and being prepared is important. As a new governor you may not feel very confident at your first meeting but you should be introduced, made to feel welcome and asked if you understand everything. The culture of the board is set by the chair who should not be on a power trip!

### **P is for Prevent**

The Prevent duty requires schools to *have due regard to the need to prevent people being drawn into terrorism*. This is underpinned by Home Office guidance and the 2015 Counter Terrorism and Security Act. The Duty covers all types of extremism, whether political, religious or ideological.

You may be asked to undertake some Prevent training on an annual or biannual basis and even if you aren't it is good practice to keep yourself informed. There is some free training provided by the Govt. available here [Prevent duty training - GOV.UK \(www.gov.uk\)](#)<sup>33</sup>

### **P is for Pupil Voice**

This is so obvious it should not need to be said but there are boards who never hear from the pupils and where governors never experience the school day and pupils are reduced to data sets. It is good practice, if you can, to visit your school during the day but always follow the school governor visits procedure.

Ask - is pupil voice a regular item on your meeting agendas? Think about what you want to know.

There is some free guidance [here](#).

### **P is for Pupil Premium**

Pupil Premium is often shortened to PP. PP provides funding for two policies:

- raising the attainment of disadvantaged pupils of all abilities to reach their potential,
- supporting children and young people with parents in the regular armed forces.

Sometimes PP pupils are called DA or disadvantaged (this is the case in the Department for Education's data sets) but be careful if you are talking to pupils at a link visit not to say they are PP or DA – they may not know. Additional monies are allocated for Looked After Children.

Governors do not need to know who is actually in receipt of PP, but they need to ensure that the money spent has impact where it should be having impact. Often a governor is given the role as PP link governor but not always. The PP action plan and statement **must** be published on the website. Governors should have sight of the strategy and action plan before it is published on the website.

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<sup>33</sup> This hyperlink cannot be edited.

At the time of writing primary schools also get a sum of money called Sports Premium. This is different from PP and should be monitored separately. Information about how the sports premium is spent must also be published on the school website.

It is really important to remember that you will have pupils in receipt of PP and who are SEND or who are high attainers or EAL<sup>34</sup>. They deserve our very best efforts. If you are interested, the [Education Endowment Foundation](#) publish some helpful research.

Keep a watch out for any updates.

### P is for Purpose

It is important to have a clear purpose for all meetings otherwise all we would be doing is having a nice chat.

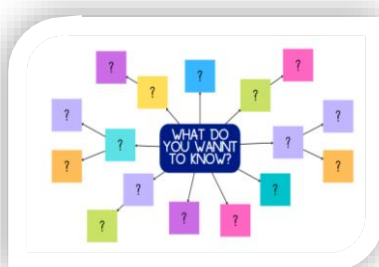
The purpose of governance is set out in the new DfE's governance guides. Why not take a moment at the start of your next meeting to ask, 'why are we here today?' The answers may surprise you.



### Q is for Questions

Curious Questions Matter. Not all questions are curious but all questions matter. It is a good idea to prepare your questions in advance – to use the Headteacher's report as a basis for your questions and ensure that all questions are minuted properly. How this is done varies from board to board. Questions asked should be minuted and so should the answers. A template is attached at the end of this document to help you think about your questions and which you may find a useful starting point.

Instead of simply asking, "*Is the school performing well?*", a governor might ask, "*What strategies have been most successful in improving student outcomes, and how do we know they are working?*" (This type of question digs deeper into the processes and evidence behind the school's performance. Deciding which strategies to use is of course operational). Other examples include "*How does our approach to student discipline reflect our commitment to inclusivity and fairness?*" (This type of question ensures that policies and practices align with the school's values) and "*how the budget decisions align with our long-term strategic goals?*" (This encourages transparency in decision-making and helps ensure that governors and trustees are considering the strategy).



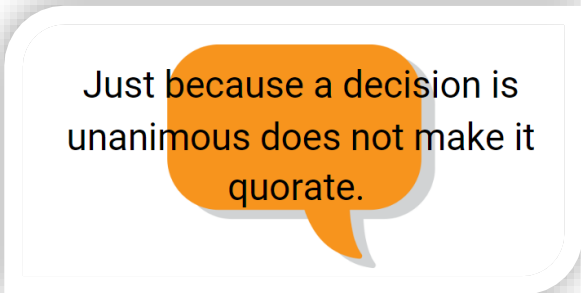
<sup>34</sup> English as Additional Language

## Q is for Quorate

Meetings that are not quorate can still take place, but they cannot necessarily make decisions. It is good to be aware of what the quorum is for all your meetings are even as a new governor. If there are 15 people round the table at an FGB in a maintained school, 3 of whom are not governors and there are 2 governor vacancies – what is the quorum?<sup>35</sup> Your clerk will check the meeting is still quorate if someone leaves the meeting. They might only mention this out loud at the meeting if the meeting becomes inquorate but they should be confirming in the minutes the time someone left a meeting and the point at which the meeting became inquorate. Often minutes will state ‘the meeting was quorate at all times.’ If you know you have to leave a meeting early it is advisable to mention this at the beginning of the meeting. It is important.

Meetings should be quorate to ensure;

1. Legitimacy – to minimise opportunity for challenge
2. Representation - to avoid groupthink and cliques
3. Accountability and transparency
4. Commitment
5. Operational efficiency – to avoid delays



Just because a decision is unanimous does not make it quorate.

The quorum of the meeting needs to be agreed in advance and most quorum are a minimum of 3 governors; (although in an academy trust the quorum for a committee meeting may be as low as 2 trustees). This will be set out in the terms of reference. If these three people are two school staff and the chair you may wish to question this – one may ask if they are *marking their own homework* so to speak. If you govern in a Voluntary Aided or Catholic church school the quorum will relate specifically to the number of Foundation Governors present at the meeting and this will be set out in the Articles of Association, terms of reference, Standing Orders or Scheme of Delegation. The clerk should be able to advise.

## R is for Relationships

There is a useful document, which is available as a pdf, called ‘*What Governing Boards should expect from school leaders and what school leaders should expect from Governing Boards*’ and is well worth reading.

Remember

- ✓ Healthy debate is a good thing.
- ✓ Not all challenge is conflict.
- ✓ Ensuring that everyone has an equal voice creates transparency.
- ✓ Having a good chair is important.

<sup>35</sup> <http://www.legislation.gov.uk/ukxi/2013/1624/regulation/14/made>

The quorum for a meeting of the governing board and for any vote on any matter at such a meeting, is one half (rounded up to a whole number) of the membership of the governing board. The membership of the governing body does not include vacant positions on the governing board. Answer is 6.

- ✓ Positive relationships support effective governance.
- ✓ Being kind to each other costs nothing.

Think about the relationships around the table – who leads, who talks, who influences, who persuades, who says nothing, who looks confused? It can be illuminating.

### **R is for Records Management**

We all need to give some thought to how we store the information we are given either at meetings or print off at home; how we store any information about our school(s) on our home computers and for how long we keep information. Ask your school what their Records Management Policy is (if they have one) and if it covers your paperwork. You may also receive encrypted emails – these are for your eyes only.

### **R is for Related Party Transactions**

A related party transaction is a transfer of resources, services, or obligations between related parties, regardless of whether a price is charged. It is good idea for all boards to irrespective of whether they have to or not;

- Keep the business and pecuniary interests of all governors and trustees up to date and published on the website,
- To ensure that anyone with an interest of any kind in any item on the agenda of a meeting declares it,
- That potential conflicts of interest are identified as soon as possible and any mitigation agreed.

If you are really keen to find out more [this](#) document from the Financial Reporting Council gives some background and the DfE have produced specific guidance on RPT available [here](#). When in doubt a) declare it and b) as your finance manager and/or Governance Professional for advice.

### **R is for Research**

It is increasingly important that we ask more research and/or evidence based questions. The Education Endowment Foundation has published some specific guidance on this which you can find [here](#). Do read and share it – it is not very long.

### **R is for Risk**

Risk is a topic which is becoming increasingly important. You will often discuss risk at meetings. It is always worth reading and understanding how the risk register is put together and who takes the lead in managing and owning the risks identified. It is good to be prepared and to remember that risk is not just about health and safety and finance and can include governance, leadership and safeguarding. Talking about risk is healthy.

All trusts must have a risk register and further information can be found [here](#) and the first paragraph states - *risk management involves the identification, measurement, management, monitoring and reporting of threats to an organisation's business objectives. Such threats could arise from a wide variety of sources, including financial uncertainty, IT security, management errors, accidents, natural disasters, and so on.*

[This](#) article from CIPFA is also a helpful read as this [Jargon Buster](#).

At your next meeting why not ask '*what are the top 3 risks we are facing as a school or trust at the moment and what can we do to mitigate?*' As governors or trustees you don't need to get into the minutiae but you do need to understand the risks the organisation is facing and your role and responsibilities,

### **S is for Safeguarding**



As a new governor make sure you do some safeguarding training as soon as possible after you join the board. If you do not get asked to do it – ask.

You may be interested in this website – [www.safeeguardingschools.co.uk](http://www.safeeguardingschools.co.uk) – there is free information for governors available for download; and you can sign up for regular newsletters. There are also a wide range of other similar providers.

Safeguarding **must** run through every action and every decision we take as governors. Your school or trust will provide you with further information.

### **S is for School Business Manager/School Business Leader**

SBM are integral (underlined 3 times in bold) part of the senior leadership team. SBM/L support the governance of the school and often attend board meetings. SBM usually have a background in finance and previously were more common in academies than maintained schools but this is no longer the case. When you ask about the HT's wellbeing ask about that of the SBM and office staff as well. Without them there would be no school.

### **S is for School Council**

One of the quickest ways to find out what pupils think is to ask them and one of the best ways of asking is to talk with the School Council or Student Leadership Team. It is always advisable to meet students in groups (for safeguarding reasons) and it is helpful if you discuss some pre-prepared questions to get the conversation going. Young people have some incredible insights to share and if we do not take the opportunity to talk with them then we are missing a trick.

Another option is to invite the School Council to come and meet the governors or trustees either during the school day or before a board meeting.

See also P is for Pupil Voice.

### **S is for School Financial Value Standard (maintained schools only)**

The SFVS helps schools to manage their finances and to provide assurance to the LA that they have secure financial management in place; whilst it is for maintained schools, some academies find the checklist useful as it looks at ways to help schools consider the skills of governors, benchmarking, reporting systems and governance. You can find the guidance and checklists [here](#).

Some schools set up a small working party to work through the required questions rather than rushing it all though just before the deadline.

#### **Top Tip**

- The SFVS is your document as governors – you need to own it.

### **S is for Scrutiny**

It is good practice for the board to scrutinise, to take an analytical and thoughtful, evidence based approach to asking questions and to offer appropriate challenge. You can scrutinise data, processes and finance. Remember the strategic and operational boundaries at all times.

Some questions that might help with scrutiny are;

1. What interventions have we put in place to support underperforming students, and how are we measuring their effectiveness?
2. How are we ensuring value for money?

Areas that are regularly scrutinised by governors or trustees include

- Reviewing attendance, behaviour and performance data
- Budgets and funding

- Audit and compliance

### **S is for Single Central Record**

Governors need to take responsibility for ensuring that the SCR is up to date (this is usually the safeguarding governor) but they do not need to see the details. There are useful checklists published on the internet. The SCR is as important as the attendance register. This link on [FAQ](#) is helpful

Ofsted always checks the SCR during an inspection.

Amanda Speilman, the former Chief HMI, told governors in June 2019<sup>36</sup> which is worth bearing in mind as it is still relevant;

*As governors and trustees, you are responsible for making sure that safeguarding procedures are properly followed in schools. But that doesn't mean you have to go through your school's central record yourself. You need to make sure the overarching culture is right. What is your school doing to identify children that may be at risk of harm? How is your school helping those children and fulfilling its duties? This, too, is when it's more helpful to look up at the big picture, rather than down into the detail.*

### **S is for Stakeholders**

This word can be used to describe your wider school community as well as anyone who has a stake in school improvement. A good topic for discussion is to ask the board to identify as many stakeholders as possible and to then consider their importance, impact and involvement in the short, medium and long term life of the school and its community.

The board should oversee strategic relationships with:

- parents
- the school and trust's communities
- the church community and diocese (in the context of church schools)

Can you think of any other groups?

### **S is for Skills and Knowledge Audits**

Skills audits should be undertaken regularly and as a new governor or trustee you may have been asked to fill an audit form in before you joined the board. It is also a good idea to 'test' the board's knowledge regularly as well. There are several models and templates and your school may follow the National Governance Association model or it may follow one which it has designed itself. Other models are available from the Chartered Governance Institute who offer a model for academy trusts [here](#).

### **S is for Social Media**

Lots of schools use social media. If you use social media<sup>37</sup> make sure you have read the school's social media policy, that you follow the requirements of the code of conduct and you respect the confidentiality of the board meetings. If someone has a complaint about the school, always refer them to the school's complaints policy and try not to get involved.

Try also not to get involved in conversations on social media about the school you govern in – this may even be covered in your code of conduct. It is easier that way.

#### **Top Tip**

- Try not to make decisions by WhatsApp – it is not appropriate! And remember all our digital transactions have a 'footprint.'

<sup>36</sup> Speech to the NGA Summer Conference 2023

<sup>37</sup> [Cyber security in schools and trusts | National Governance Association \(nga.org.uk\)](#) – requires a log in



## S is for Spelling

Minutes full of typing, spelling and grammatical errors do not look professional but do not get hung up on a missing full stop or misplaced comma! Chairs who meticulously spell and grammar check minutes line by line and word by word do not always make themselves popular with their clerk unfortunately.

## S is for Special Schools

Every governor and trustee should read the [Special educational needs and disability code of practice](#) which is the statutory guidance for organisations which work with and support children and young people aged 0 to 25 years who have special educational needs or disabilities.

A named governor should be given the role of monitoring the outcomes of pupils with SEND. Each school has to have a SENCO or SENDCO. The SENCO has a critical role to play in ensuring that children with special educational needs and disabilities within a school receive the support they need. It is good practice for the board to receive an annual report on SEND. Some trust boards also identify a named trustee for SEND.

Special schools with pupils aged 11 and older can specialise in 1 of the 4 areas of [special educational needs](#):

1. communication and interaction
2. cognition and learning
3. social, emotional and mental health
4. sensory and physical needs

Schools can further specialise within these categories to reflect the special needs they help with, for example Autistic spectrum disorders, visual impairment, or speech, language and communication needs (SLCN). Ask for some training from your SENCO as this will help you frame the all-important questions.

## S is for Staffing

New [Staffing and employment advice for schools](#) for September 2024 was published by the DfE at the beginning of the academic year. The guidance reminds *governing bodies, including academy trusts, should ensure that they have access to appropriate professional advice and support from reliable and accredited individuals or organisations, including legal advice where necessary.* Even if you know a lot about HR processes it is always wise to seek external advice.

## S is for Standing Item

These are items on your termly or committee agendas which you must discuss at every meeting. These items usually include safeguarding, health and safety and risk. Sometimes these matters are covered in CEO or Headteacher reports and if this is the case your clerk will ensure that they are highlighted in the minutes so the information is easy to find.

## S is for Standing Orders

Standing Orders are the processes and protocols which support the administration and organisation of governance practices. Not all schools and trusts have standing orders but they can be very useful in preventing confusion about who appoints the chair of the Local Governing Board or how long link governors are in role for as well as a wide range of other admin and protocol based decisions.

## S is for Strategic

Boards should know the difference between strategic and operational decisions although sometimes there is a balance to make.



The three core functions of governance should be driving the business of governance. If your FGB or LGB is only talking about school trips, pupil performances and the colour of the new carpets this is not governance or strategic for that matter.

You might find this diagram aimed at academy trust on the next page a useful starting point for discussion. It is based on an NGA model.

### **S is for Succession Planning**

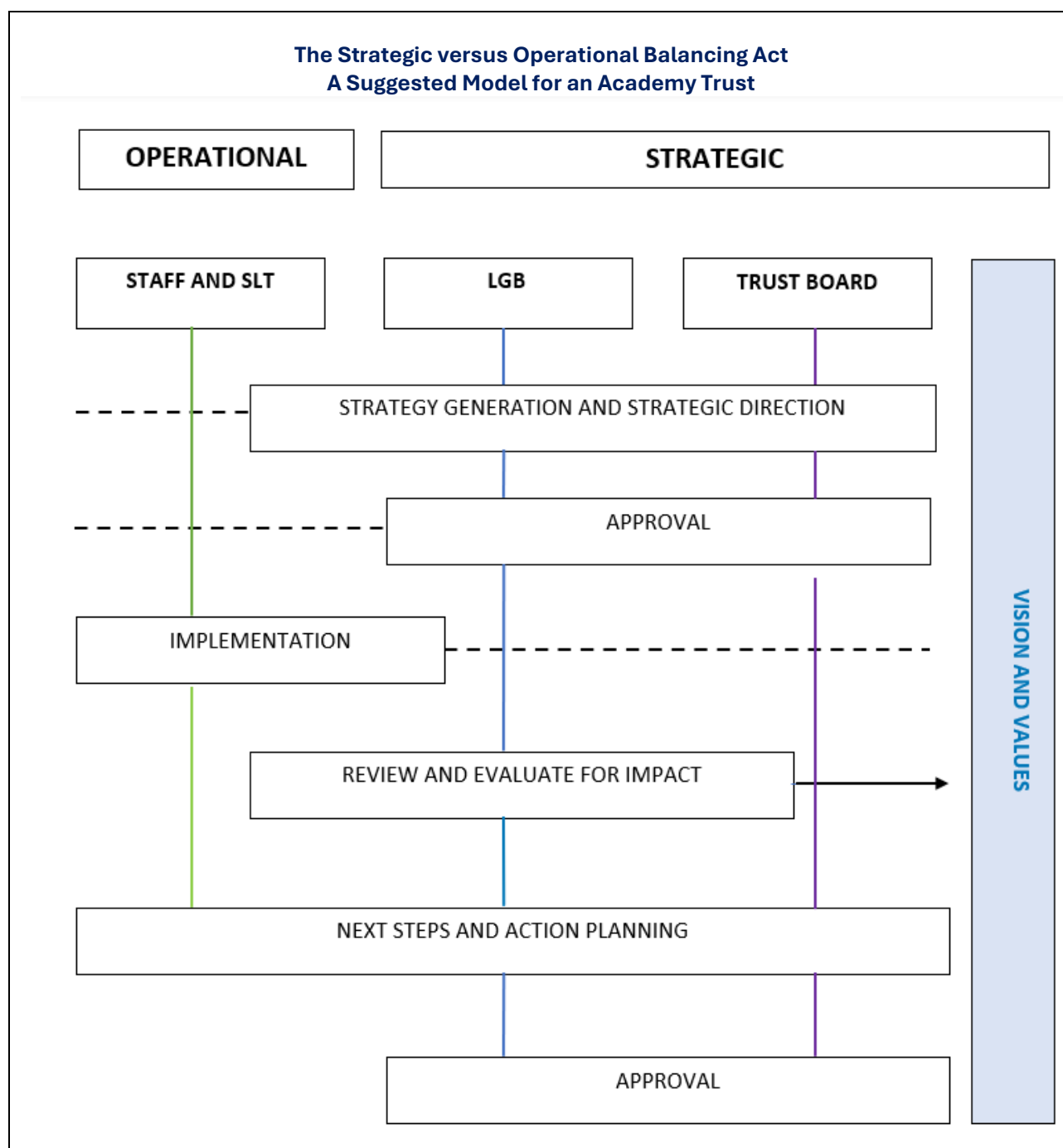
It is really important that you think about the future. What will happen if the chair suddenly resigns or leaves the board for any reason? Or the governor with a responsibility for safeguarding or the governor who knows everything about pupil premium (hint - everyone on the board should know something)? We should all begin, if we have not already, to establish and maintain 'a culture of succession' and have in the words of the NGA *ongoing, honest discussions about succession planning*<sup>38</sup> where governors/trustees feel comfortable about discussing their intentions. Chairs should model practice so that aspiring chairs feel that the role is manageable. No one person can do the work of the board after all. Equally chairs should not be chairs forever but changing the chair every year or two can be disruptive.

### **S is for System Leadership**

First some history. System leaders were people appointed by the DfE to work with schools outside their own school and were known as National Leaders of Education (NLE) and National Leaders of Governance (NLG). Some areas also have Local Leaders of Governance. You may also have heard about Teaching Schools and Teaching School Alliances but these ceased to exist at the end of August 2021 to be replaced by a network of [Teaching School Hubs](#). If you follow the link there is a downloadable list of Hubs so you should be able to find your nearest one without too much difficulty. The DfE have recently announced a new cohort of NLEs. There are also now Maths Hubs and Behaviour Hubs; however, with a new Government being elected in July this landscape may change.

In August 2021, the DfE launched a refreshed cohort of National Leaders of Governance who have a different system leadership role and function and work in a commissioned capacity via the National Governance Association. A number of former NLG came together in the summer of 2021 to form **Independent Governor Support** (at the time of writing there were over 30 former NLG in the group). These former NLG can be commissioned independently and undertake a range of paid and free of charge work and support for schools and academies across England. Their website is [www.independentgovernor.com](http://www.independentgovernor.com). Do please get in touch we'd love to hear from you (declares an interest!)

<sup>38</sup><https://www.nga.org.uk/News/NGA-News/Jan-2018-Mar-2018/Preparing-your-Board-for-the-future---new-guidance.aspx>



### T is for Training and CPD

Governance training is sometimes one of the first things that schools stop funding when budgets get tight, although if you look hard enough there is much affordable training available.. If you are methodical in your approach to your own learning, ensure that there is always an item on governor training on the board agenda and you develop as a board a variety of ways to cascade and communicate your individual and collective learning outcomes then all will be well. It is a good idea to keep a copy of any certificates or email confirmation of attendance to the person nominated to collect and collate. This could be the clerk, another governor or the SBM.

Sometimes boards organise whole board training. This can take place as part of a board meeting, at an away day or be led by a member of staff or the Headteacher. You can also ask for an external person to facilitate. If this happens it is a good idea to make sure that it is minuted as having taken place.

Some boards have a simple form about the impact of training for you to complete and share.

### T is for Trustee

Trustees, sometimes called Directors, are the middle layer in the trust governance ‘cake.’

The new Academy Trust Governance Guide states; *Trustees will have the necessary skills to fulfil the board’s functions effectively. They will have the ability to:*

- bring a diverse range of perspectives for robust decision-making
- understand the educational setting and the cultural and religious contexts of the trust and the communities it serves
- analyse trust performance data
- use financial knowledge to hold the executive to account and drive financial efficiency
- challenge each other effectively and work effectively in committees
- performance manage the senior executive leader
- use active succession planning to ensure the board and the trust have the leadership and people it needs to remain effective

If you are a new Trustee [this](#) is an important read – it is a guide called ‘The Essential Trustee’. New trustees should also have induction training. As a Trustee you may not know the schools within the Trust as well as you would if you were a governor – this is not always a bad thing as it can help impartiality but you must be curious and challenging about them all.

In some maintained Church of England schools you may also hear about trustees but these are church trustees and their role and responsibilities are mostly related to estates and premises.

### T is for Types of Governor

The main types of governors are;

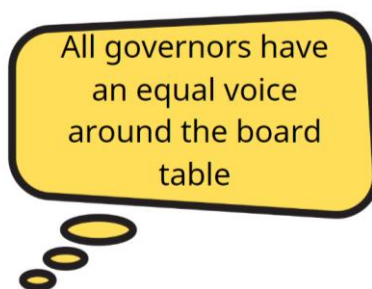
- Co-opted governors are appointed by the board for their skills (sometimes called community governors).
- Staff governors are elected by the staff (1 in a maintained school – check the AoA in an academy).
- Parent governors are elected by the parent body (2 in a maintained school – check the AoA in an academy). If you are a parent governor you are a representative of the parent body not a representative for the parent body; do not go rushing into the playground trying to gather views or report what was said at the meeting. This is sometimes hard so if you find yourself in a tricky situation, step back politely and direct the person to the school’s complaints policy.
- Foundation Governors are appointed by the church if you are in a church school but can also be appointed by the founding body of the school. If you are in a Voluntary Aided<sup>39</sup> (VA) Church of England school, for example, governors have some additional responsibilities. It is important that you know what these responsibilities are.
- The LA governor is recommended by the board to the LA and the board has an element of choice over whether to appoint or not. Most trusts do not have LA governors but one or two do appoint.
- Only the Headteacher can be the Headteacher governor but sometimes this can be the Executive Headteacher. It cannot be the staff governor and the role cannot be passed to anyone else.
- Associate members are not governors and cannot vote unless the board specifically agrees. Not all boards have associates.

<sup>39</sup> Voluntary-aided schools are maintained schools and often, but not always, have a religious character. This is a very useful guide to the difference between VC and VA schools <http://www.rdbe.org.uk/schools/information-for-schools-3/information-for-schools-2/voluntary-aided-voluntary-controlled-schools/frequently-asked-questions-2>

- Other persons may (may not will) be invited to attend at the request of the board<sup>40</sup>.

Each type of governor has a term of office. This is usually 4 years but can be less. It cannot be more without re-election or re-appointment. This should always be minuted. Your clerk will lead you through all election and appointment processes.

The Chair should be elected following due process and can be any category apart from staff, head teacher or associate member; the same goes for the vice chair.



### **T is for Type of School**

This is a link to a DfE page describing the different types of school.

[Faith schools](#)

[Free schools](#)

[Academies](#)

[City technology colleges](#)

[State Boarding schools](#)

[Private schools](#)

There are also residential schools, Pupil Referral Units, and free schools.

### **U is for Understanding**

If you do not understand something ask. Everyone was a new governor once and the chances are you will not be the only person in the room wondering. Go on, be brave!

### **U is for Uniform**

You may be interested in this report [Cost of School Uniforms Survey 2023](#). Schools should ensure their uniforms are affordable; give high priority to considerations of cost for parents; and be able to demonstrate how best value for money has been achieved.

### **U is not for Unilateral**

All decisions are joint decisions and there are only very few times when the Chair should be making decisions outside of a board meeting and if they do these must be reported and minuted at the first available opportunity. Sadly, this happens. See also collaboration and Powers to Act.

Unilateral decision making is not good governance.

### **U is for Unusual**

It is always good to ask questions about what looks unusual. Be curious but do not worry too much about outliers in the data but always worry about outliers in terms of safeguarding

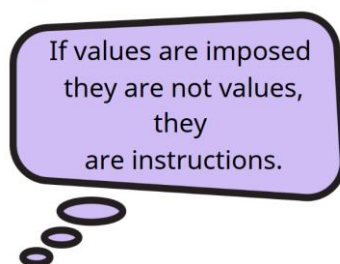
<sup>40</sup> [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013 - part 4](#)

## U is for Update

Keeping updated is an active process. You need to engage with the updates sent to you by the chair, clerk, head, LA or trust. Keeping yourself updated does not happen by some weird process of osmosis – it takes positive action! Set a small amount of time aside each week to check your school emails.

## V is for Value(s)

Every school should have a vision and values statement and this could be a separate document or it could be incorporated into all the schools documents. The values should be understood by everyone in school including the governors and should be collectively agreed. They should be embedded and not an 'add on. Lived and not laminated and all that!



If the only time you see the values in school is when they are printed on a doormat then you may have a problem.

## W is for Website

School websites are really important. The website should be easy to navigate and everyone should be able to find the information they need quickly and easily – more than 3 clicks and you may get lost!

The website should contain all the information that the school or trust is required to publish as well as all the other useful information about the school for the parents, prospective parents, carers and school community. The checklist for what must be published on the school website is freely available. Please note this list does change regularly.

The DfE has produced guidance for maintained schools [here](#) and information is updated regularly. It may be worth checking if your board has a governor who regularly looks at the website. If you are governing in an academy then the guidance is [here](#). The DfE are now producing their guidance documentation as web pages not pdfs so if you do download and share anything make sure you are using the latest version.

## W is for Wellbeing

It is good practice to consider the wellbeing of everyone; staff, headteacher(s), pupils and governors.

It is becoming increasingly good practice to have a governor with an oversight of mental health and wellbeing. Sometimes this is the safeguarding governor but not always.

A useful starting point is a document called [Mental health and behaviour in schools](#) which was published in November 2018 but as it has not been withdrawn we can presume it is still extant. There are a wide range of useful guides and toolkits available on the internet which are suitable for use by governors and trustees.

Wellbeing is intrinsically tied up with culture, workload and the personal and is the *how* and not the *what*. Remember governors have wellbeing too. Please do not ever feel alone.

An Accredited Wellbeing Governor E-Module and Wellbeing Award is available and it can be found via an internet search.

## W is for Whistleblowing

Only blow the whistle if you are totally 100% sure. If you find you need to whistle blow it may be wise to seek external and impartial advice first. The NGA and CST is one potential support as are National Leaders of Governance or the Governor Services team in your local authority if there is one. Further guidance can be found [here](#). When in doubt – ask a trusted colleague. Don't be alone but do be brave.

The policy needs to be approved every year by the full board.

## W is for Workload

Teacher workload is an issue and this is the [outcome](#) of a recent government survey. This report presents the findings from the Teacher Workload Survey (TWS) 2019, which is a large-scale nationally representative survey of teachers, middle leaders and senior leaders, conducted over a three-week period in March 2019. The survey helps act as a national 'barometer' for teachers,' middle leaders' and senior leaders' working conditions and forms a key part of the DfE's commitment to improving the evidence base on what drives unnecessary teacher workload and what works to reduce it.

## X is for No Excuses

No such thing anymore. It's no good telling Ofsted you did not know what you needed to know and expect them to be understanding ...neither is there an excuse for saying *we have always done it this way* because if *you always do you what you have always done you will always get what you have always got* and that is not necessarily a good look!

## Y is for You

Your voice is important. As a new governor you will bring a fresh perspective. Remember it is okay to enjoy being a governor. You may well gain some transferable skills!

## Z is for Zero

Data. Data. Data. There is a lot of data presented to governors; sometimes it can be impenetrable. It is a good idea to ask for an explanation of the data you are being presented with so that you can frame your questions and link visits accordingly. Sometimes a zero is acceptable e.g. a nil return; sometimes it is not. Context is everything. The amount of data you will get as a governor may change now that the Ofsted inspection framework has changed so watch this space. Try not to get so mired in the detail that you lose sight of the bigger picture or try to score points because you spotted a small numerical inaccuracy. Sometimes we need broad brush, sometimes we don't.

If you would like more information on governor training or you have any questions please contact

- Your local authority governor service team if there is one,
- A former National Leader of Governance - information can be found at [IGS](#),
- Your chair of governors, trust chair, clerk or governance manager.
- 

## So, in conclusion

**Being a governor or trustee is very rewarding.** It is not always easy but if we never forget that we are governing for the benefit of our children and young people then together the 200,000+ governors and trustees will make an impact on the outcomes and life chances of the next generation.



## Author Note

SBW is very happy for people to share The GBGG with the governors and trustees on their boards. If have received a copy of this Glossary please consider making a donation to your local foodbank or The Trussell Trust Further information can be found at [The Trussell Trust - Stop UK Hunger](#)

The Glossary has been prepared in my spare time and whilst I hope you find it useful there may be some links that are out of date or that do not work. The questions suggested and top tips are a personal opinion – remember '**what works somewhere will not work everywhere.**' The errors are my own and I will own them!

## Contact Information

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I am also on LinkedIn.



## Appendices & Toolkits

### A Selection of Acronym and Abbreviations

AEN	Additional Educational Needs	
ACE	Adverse Childhood Experience	
ATH	Academy Trust Handbook	Academies
AoA	Articles of Association	Academies
ASP	Analyse School Performance	Data
CAMHS	Child and Adult Mental Health Service	Also Younger Minds
CIF	Condition Improvement Fund	Academies
CIN	Child In Need	Safeguarding
CLA	Children Looked After	Sometimes called LAC
CoG	Chair of Governors	LGB and maintained schools
CSE	Child Sexual Exploitation	Safeguarding
DBS	Disclosure and Barring Scheme	Used to be called a CRB check
DDA	Disability Discrimination Act	
DFC	Devolved Formula Capital	Funding
DSL	Designated Safeguarding Lead	Safeguarding – often the Headteacher
EAL	English as Additional Language	
Ed Psych	Educational Psychologist	
ECT	Early Career Teacher	Replaces NQT
EEF	Education Endowment Fund	Online toolkits
ERG	External Review of Governance	
ESFA	Education Skills and Funding Agency	
EHCP	Education Health Care Plan	
EVER 6	Ever 6 Free School Meals means those pupils recorded on the School Census who were recorded as known to be eligible for (FSM) in any of the termly censuses in the past 6 years.	Relates to FSM
EWO	Education Welfare Officer	
EYFS	Early Years Foundation Stage	Reception class
FFT	Fisher Family Trust	Data
FGM	Female Genital Mutilation	
FOI	Freedom of Information	
FSM	Free School Meals	

FTE	Full Time Equivalent	Staffing
GAG	General Annual Grant	Academies
GB	Governing Board	Sometimes called body
GDPR	General Data Protection Regulations	From May 25th 2018
HR	Human Resources	People
HTLA	Higher Level Teaching Assistant	
HTPM	Headteacher's Performance Management	
ICT	Information and Communications Technology	
IDSR	Inspection Data Summary Report	Primary and secondary
IEB	Interim Executive Board	GB of a school in Special Measures
INSET	In Service Training day	Staff training days, 5 per year
IOG	Instrument of Government	GB structure - legal document setting out constitution-maintained schools
ITT	Initial Teacher Training	
ISR	Individual School Range	Used in pay decision for senior leaders
KCSIE	Keeping Children Safe in Education	
KS1 and KS2	Key Stage 1 (years 1-3); KS2 (years 3-6)	
KPI	Key Performance Indicator	
LAC	Looked After Child	
LCSB	Local Children's Safeguarding Board	
MAT	Academy Trust	
MFL	Modern Foreign Languages	
NC	National Curriculum	
NFER	National Foundation for Education Research	
NGA	National Governance Association	
NLE	National Leader of Education	
NLG	National Leader of Governance	
NOR	Number on Roll	You must keep this under review
NPQ	National Professional Qualification	
Ofqual	Ofqual is responsible for regulating GCSEs, AS and A levels in England and a range of vocational and	

	technical qualifications, such as Applied Generals and Tech Levels.	
Ofsted	Office for Standards in Education	
PAN	Planned Admission Number	
PHSE	Personal Social and Health Education	
PI	Performance Indicators	
PP	Pupil Premium	Also think about sports premium
PPA	Planning Preparation Assessment	
PRP	Performance Related Pay	
PRU	Pupil Referral Unit	
PSED	Personal Social emotional development	
PTA	Parent Teacher Association	
PTCD	Staff pay and conditions document	
QA	Quality Assurance	
RIDDOR	Reporting of Injuries Diseases and Dangerous Occurrences Regulations	
RSC	Regional Schools Commissioner	
SAR	Subject Access Request	<a href="#">Right of access   ICO</a>
SATs	Standard Assessment Tests	KS1 and KS2
SCR	Single Central Record	
SDP	School Development Plan	Sometimes called improvement plan
SEF	Self-Evaluation Form	
SENCO	Special Educational Needs co-ordinator	
SEND	Special Educational Needs and Disability	
SFVS	School Financial Value Standard	maintained schools only
SIAMS	Statutory Inspection of Anglican and Methodist Schools	
SLA	Service Level Agreement	
SLT	Senior Leadership Team	
SMCS	Spiritual, Moral, Social and Cultural Development	
SRMA	School Resource Management Advisors	Academies
SoD	Scheme of Delegation	Academies
STA	Standards and Testing Agency	

TA	Teaching Assistant	
TOR	Terms of Reference	
TSA	Teaching School Alliance	
UFSM	Universal Free School Meals	
URN	Unique Reference Number	Each school has a unique number
Virtual School	Virtual Schools works in partnership with the child or young person's school/educational setting to ensure that they are supported to fulfil their potential at all stages of their education, and to give them the best opportunity to be successful in their adult lives.	
VA	Voluntary Aided	
VC	Voluntary Controlled	
VFM	Value for Money	
VLE	Virtual Learning Environment	

## Some other sources of information

**Independent Governor Support** (a group of former NLGs who are working together to provide free support)  
[www.independentgovernor.com](http://www.independentgovernor.com)

National Association of School and College Clerks – a new independent organisation for clerks and governance professionals [www.nascc.co.uk](http://www.nascc.co.uk)

**National Governance Association** <https://www.nga.org.uk/Guidance/Glossary.aspx> Membership applies (individual and school/trust)

**Confederation of School Trusts** Membership is for academy schools only – no individual members.  
<https://cstuk.org.uk/>

**Governor Hub** A subscription service used by many schools to handle and share information.  
<https://governorhub.com>

**Trust Governor** A subscription service used by Trusts.

**The Key for Governors** <https://schoolgovernors.thekeysupport.com/> A subscription service for schools and trusts.

**The School Bus** <https://www.theschoolbus.net/home> A subscription service for schools and trusts.

### If you clerk in an academy

**Trust Governance Insight (TGI)** a network for academy clerks and governance professionals.

<https://cstuk.org.uk/professional-development/networks-and-forums/trust-governance-insight-network-a-programme-for-trust-governance-professionals>

**NASEN** has a range of useful documents in relation to special educational needs. They publish a Governance Handbook on SEND which is a really important read and well worth a purchase.



Curious Questions Matter. What's Yours?	
Date	Meeting
Subject/Context	
Question	
Answer	
Shared with/reported to	
Next steps	

	Risk factors	Possible reasons	Some Possible solutions
1	Lack of time for debate and/or truncated debate	Poor agenda planning Weak chairing Lack of preparation	Revise the agenda
2	Complacent or intransigent attitudes	Lack of understanding of role	Training
3	Undue focus on short-term time horizons	Too operational	Development Planning
4	Dominant personality or group of trustees on the board, inhibiting contribution from others	Weak chairing	Training Succession Planning
5	Insufficient diversity of perspective on the board - 'group think'	Succession planning	Recruitment Strategy Skills Matrix
6	Excess focus on risk mitigation or insufficient attention to risk	Lack of knowledge	Revise the agenda Strategy led/focus
7	A compliance mindset and failure to treat risk as part of the decision-making process	Lack of understanding of the role of governance	Training Collaboration
8	Insufficient knowledge and ability to test underlying assumptions/ inability to challenge effectively	Lack of confidence and knowledge	Training Link roles
9	Failure to listen to and act upon concerns that are raised	Complacency – lack of knowledge of risk	Better understanding of policies/roles
10	Failure to recognise the consequences of running the trust on the basis of self-interest and other poor ethical standards	Lack of understanding Poor leadership Values not lived	Better understanding of policies/roles
11	A lack of openness by trust leaders, a reluctance to involve trustees, or a tendency to bring matters to the board for sign-off rather than debate	Lack of clarity on roles	Better listening and research
12	Inadequate information or analysis/ poor quality papers/ insufficient notice.	Poor reporting Weak challenge	Improve quality of reports Employ Governance Professional

Risk Factors in Poor Decision Making

## Indicators of an Effective and Successful Governing Board<sup>41</sup>

### Introduction

This quick read offers some suggestions about ensuring that we remain focused on what matters.

### Keeps Pupils at the Centre

A successful Governing Board:

- Remembers that they are governing for the benefit of pupils,
- Hears from and talk to pupils regularly and seeks their views, experiences and aspirations and responds to their issues and concerns as appropriate,
- Ensures that safeguarding and understanding context is the heart of everything,
- Understands how the trust's values align with the school's values,

### Lives its Values

A successful Governing Board::

- Knows and understands the school/trust's values,
- Understands that the first core function of governance is to ensure clarity of vision, ethos and strategic direction and successful boards,
- Refreshes and reviews the school's vision regularly, plans ahead (horizon scans)
- Lives their values through the way they undertake governance,
- Understands the Nolan Principles - selflessness, integrity, objectivity, accountability, openness, honesty, leadership,
- Takes time to reflect on their practice,
- Is open about conflicts of interest and business interests and respects confidentiality,
- A successful board is concerned for the wellbeing of the school leaders, staff and pupils.

### Celebrates Success

A successful Governing Board:

- Is able to recognise success but must always remain authentic; ensuring they recognise the small and bigger successes and achievements,
- Celebrates that success – theirs, pupils, staff and leaders.

### Knows Itself

A successful Governing Board::

- Undertakes regular self-evaluation and, importantly, acts upon what it finds,
- Is aware of its own 'maturity' and knows what it needs to do next,
- Undertakes regular skills audits and appoints to support the skills matrix,
- Ensures that it undertakes succession planning,
- Uses the DfE Competency Frameworks not as a checklist but as a scaffold to better practice,
- It does not appoint members in its own image and takes risks,
- Is a capacity giver and shares experiences across the Trust and beyond.

### Networks and Collaborates

A successful Governing Board::

- Not only knows its own strengths and weakness it also participates in networks within the local community of schools,

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<sup>41</sup> An earlier version of this list was prepared by myself when I was working as Governance Lead and a large multi academy trust. I hope it remains useful.

- Looks outwards and well as inwards,
- Has individuals who are active participants in wider networks.

### **Develops as a Team**

A successful Governing Board::

- Realises it is greater than the sum of its parts and that everyone has equal voice,
- Recognises that the critical relationship is between the chair and the Principal,
- Supports the professional development of the clerk,

### **Understands Ofsted**

A successful Governing Board supports the leadership team by:

- Being aware at all times of the progress being made towards Ofsted development points,
- Making structured progress towards addressing any weaknesses identified in the data,
- Making the necessary progress towards implementing the outcomes of any Pupil Premium Review or Internal and External Reviews of Governance,
- Realising the importance of being 'Ofsted ready' but this is not the driving force,
- Working towards an Ofsted 'action plan' should not be the sole focus of governance and there is a balance between understanding what we need to know about Ofsted and the needs of our school community,
- Working towards an Ofsted 'action plan' should not be the sole focus, and there should be a balance between understanding what governors need to know about Ofsted and the needs of the whole school community.

### **Undertakes Training and Development**

A successful Governing Board ensures:

- that it is constantly learning and its members undertake training and CPD regularly,
- shares and reflects on their learning to improve practice.

### **Complies but is not Compliant**

A successful board ensures that it:

- Complies with the relevant legislation, guidance, governing documents, but does not so without questioning,
- Interrogates budgets and reports within deadlines,
- Understands Health and Safety guidance and follows this appropriately,
- Checks that the single central is kept in line with guidance,
- Websites are updated regularly,
- Policies are adopted to schedule;
- Discusses risk regularly.

### **Is curious and brave**

A successful Governing Board:

- Remains constantly curious,
- Asks questions and does not necessarily accept the first answer,
- Respects boundaries, and understands the different layers of governance and the difference between strategic and operational,
- Remains professional,
- Hears from and listens to a range of voices,
- Does not take the easy option,

- Maintains clarity of the vision and values of the school, and the strategic plan to achieve objectives set.
- Is never passive.

Your Thoughts and Next Steps



What.  
If..?

**The End ...or the Beginning...?**