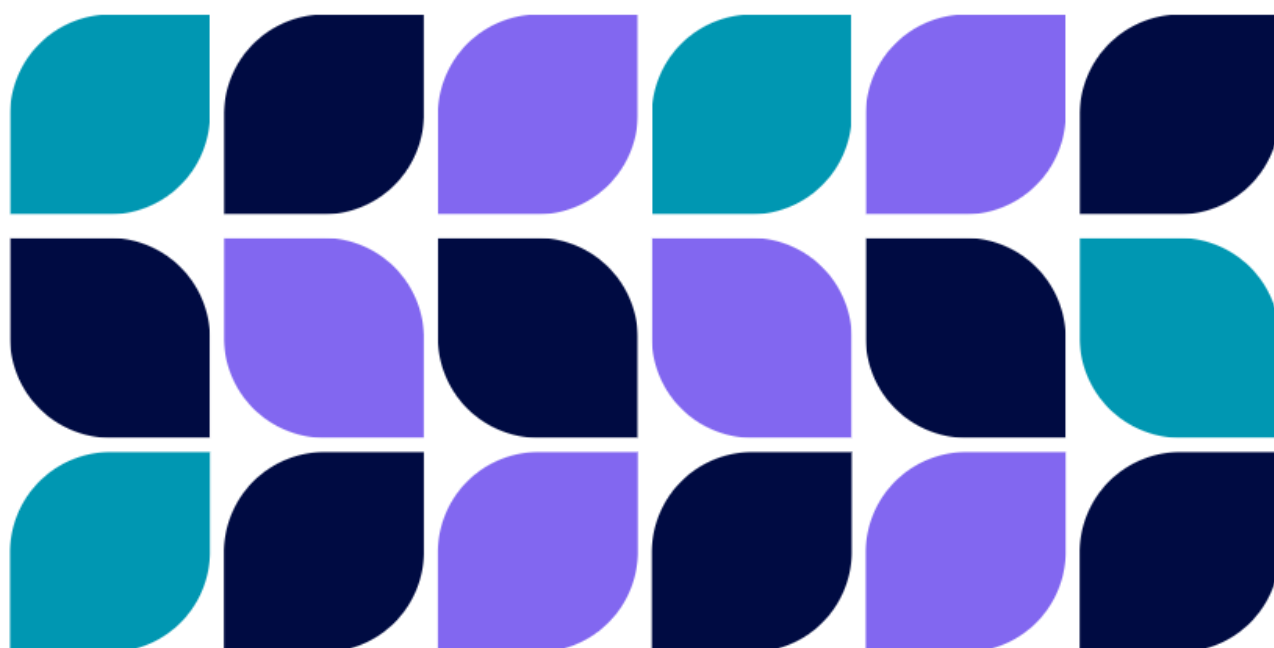


An A-Z of terminology for education governance



The Great Big Governance Glossary

2025–2026

www.sbwgovernance.co.uk

This Glossary has been written by SBW Governance and is free to download and share

Welcome to the 2025/26 Great Big Governance Glossary

How time flies!

Before we start thank you to everyone who downloaded a copy of the previous version(s) of the Glossary – your support is very much appreciated. Like the 2024/25 version this year's version is also 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 (as this is how I make my living) 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, trustees, and clerks/Governance Professionals in mind there may be some of the content that may interest you even if you have been governing for many years. I certainly learnt new things as I updated the Glossary! The hyperlinks and definitions interspersed throughout the Glossary have been chosen to help you navigate your governance role. The bulk of the Glossary remains the same as last year with the hyperlinks updated and some new sections added. The Glossary contains definitions to words and phrases that I have come across in my work as a governance consultant and clerk – I hope you find something that resonates, makes you think, and which offers a new perspective.

Why, you may wonder, have I continued over the last 10 years or so to write an 80+ 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 particularly in those first few governing board meetings. The Glossary contains 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 though 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 and include documents that I have found useful in my own roles.

The tone of The Glossary is one which is, I hope, easily 'digestible' and at times takes a light hearted tone. This is because whilst governance is a serious business we need to take a step back sometimes and read things that we can dip in and out of as we go along. 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 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) or academy trusts], 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.

Governors and trustees 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.

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 and missing full stops.

Be kind!

Fee Stagg

September 2025

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About SBW Governance

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

SBW Governance is owned by Fee Stagg who was, until August 2021, a National Leader of Governance. Fee is currently a Chair of Trustees of an academy trust straddling the east and west 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 and counting.

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 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.independentgovernor.com and many of the services IGovS offer are free of charge. She was also a co-founder of the National Association of School and College Clerks (www.nascc.co.uk) a network set up 'by clerks, for clerks.'



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](#).

Author Note

SBW Governance is very happy for people to share the Glossary with the other governors and trustees on their boards; but if you reference the Glossary in public please refer to SBW. Thank you.

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 and remember '**what works somewhere will not work everywhere.**'

The errors are my own and I own them!

Fee can be contacted on fiona@sbwgovernance.co.uk or you can follow her on LinkedIn [here](#).

Thank you for your continued support.

Introduction

Dear Reader,

Are you sitting comfortably? Pull up a chair, pop the kettle on (or on again if you have read the Glossary before) 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 done some training and are ready to go. You are still none the wiser. Dear reader, this happens far too often but 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 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 for 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 important 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 as you go along.

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.

Quick question – have you been allocated a mentor? This may help if you are mentoring a new governor yourself [How to mentor a new governor: tips and questions to ask](#)

Top Tips for new clerks

- 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 way back in 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 and what governance layer you ‘sit at.’

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 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 download¹ 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 2025)
 - Keeping Children Safe in Education (September 2025)
- 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

¹ If the hyperlinks do not work – try doing an internet search.

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 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](#) (also known as the Nolan Principles) – more of which later.
- Safeguarding essentials - you **must** be familiar with the contents of [Keeping Children Safe in Education](#) and 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 2025](#) (which is effective from 1st September 2025) is 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 as these are really useful. 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 still not statutory but are of increasing prominence.
 2. 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 for the various committees. 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 (a membership organisation) has also 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 - [Governing a school trust](#).

There are also useful regular newsletters issued by the Education Skills and Funding Agency (ESFA) which you can find on the DfE website. There is also an option to sign up to emails. The ESFA was merged into the DfE early in 2025.

Thinking of joining an academy trust?

If you are 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; see above) 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! The academisation journey may have slowed a little but schools are still joining academies and so it is worth thinking about if it is the right thing for your school to do.

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. IGovS is a good place to start as they can offer impartial advice.

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 dioceses do the same. Do please do some research or ask your Governance Professional for advice and signposts.

If you are governing in a church school you should also be given copies of the last SIAMS or CSI2 reports and someone should take you through what this means to you as a governor. It is especially important to understand what your specific role is in inspections if you are a Foundation or Church 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. At the time of writing this update this was the latest update from Ofsted (July 2025) and is about the new inspection regime starting in the autumn term.

DfE

The DfE have published its key strategy [Giving every child the best start in life](#). The opening sentence states *The foundations of the stronger society this government wants to build must be laid down from the very start of children’s lives*. If you have a chance it might be worth a read.

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 National Governance Association etc –some information is free to download so you will not need a subscription to access the information. If something you think should be in the Glossary check out the acronym and abbreviations list in the appendices.

² These are explained later in the Glossary

Remember that there is a difference between an opinion and a fact so when in doubt ask an experienced governor or your clerk if you are unsure about anything.

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...

Good luck!

An A-Z of Governance

This A-Z takes a look at some of the most commonly used words and phrases. You 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. There are also hyperlinks to organisations that provide support or information to schools and academies – this is by no means a definitive list.



A list of all the words and phrases in the A-Z is at the end of the document.

A is for Accountability

Accountability is one of the words that you will hear a lot when you are governing. Accountability is the backbone of governance and should be 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 of course. 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 and are a good read.

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!

In summary, accountable means being legally and morally responsible for decisions, actions, and outcomes, and being able to explain and justify them to stakeholders and regulators. This is why your meeting minutes are so important.

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 some³ [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.*

There are a few circumstances when the AO is not the substantive CEO and if this is the case the DfE need to give their explicit approval.

A is for Acronym and Abbreviation

Governance is full to brim – absolutely chocker block in fact, and meetings are often bursting, with acronyms. It would take pages and pages to fill you in on all the acronyms and abbreviations used in education these days. 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 although 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!

A is for Action and Action Log

If you are asked to do something please try and do it by the deadline 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. Not even the chair.

Actions should not take place in isolation and should 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.

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

Table 1

³ This may only be accessible to CST members.

Some things to ponder...

1. if all the actions identified on an action log are for school leaders is this governance or management? governance should focus on strategic oversight, setting direction, and holding leaders to account, not carrying out operational tasks.
2. if all the actions are for the clerk or Governance Professional are they in danger of becoming a de facto governor or trustee?
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?

Top Tip

- Try not to let the action log overwhelm your meetings – sometimes we spend so long discussing action from the previous meeting or get so involved in discussing detail we lose focus.

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 arrangements⁷. If no changes are made to admission arrangements, they must be consulted on at least once every 7 years

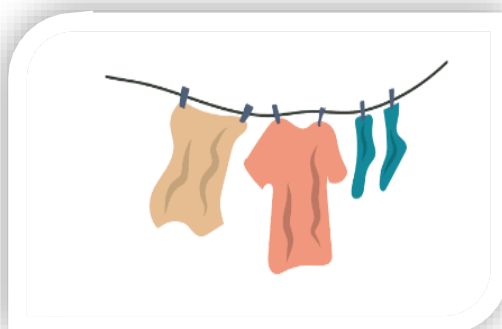
All state-funded schools must give top priority to admitting children who:

- 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 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 as the agenda 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. One may dare to suggest that they do this more often!



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 should drive meeting energy so if we are spending too long on the minutia then we may well miss the bigger picture. Sadly, this happens all too often.

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

Key features of a good agenda include:

1. **Clear purpose** – each item states whether it is for decision, discussion, or information.
2. **Strategic focus** – the majority of time is spent on long-term direction, performance, risk, and compliance; not operational detail.
3. **Logical structure** – items are grouped and ordered so urgent and high-priority issues are addressed first. Nothing worse than running out of time for discussion on a key matter. AOB (any other business) should be used sparingly and not as a way to force the board to make an important decision on the hoof so to speak or because someone forgot to add it to the agenda. It is always the chair's decision as to whether to accept AOB or not.
4. **Linked to plans and deadlines** – references relevant documents (e.g., strategic plan, annual calendar, statutory deadlines).
5. **Time allocation** – indicates how long each item should take to keep meetings on track. This can be useful if there is a lot on the agenda – most often used by chairs and clerks to help meeting management. It is not good to shut down effective discussion so timed agendas should be used sparingly so that they have maximum impact.
6. **Concise descriptions** – avoids vague titles; instead of “Finance,” say “Approve 2025–26 Budget.” This shows governors and trustees what is expected from each agenda item.
7. **Papers circulated in advance** – all reports and background information are sent ahead of time for informed discussion. Some clerks cross reference agenda items to supporting papers. This is really helpful – hint, hint.
8. **Compliance coverage** – includes statutory requirements (e.g., safeguarding, SEND, audit, risk register) at the right frequency.
9. **Space for reflection** – time for thinking about learning points, impact, and next steps.
10. **Clear ownership** – shows who will lead each item (chair, CEO, committee chair, etc.).

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 and have the following key purposes – approval of the annual accounts and financial statements, formally appoint the external auditors on the recommendation of the trust board, hold the trustees to account in ensuring governance and integrity is effective, and the appointment or reappointment of trustees and members.

It is however important to ensure that whilst the Members are kept informed appropriately they do not get overly involved in the strategy and operation of the Trust.

In some Trusts, the chair of trustees is a Member by virtue of their role. The DfE are increasingly requiring that there is clear separation between the governance layers – it is not appropriate for a Member to sit on a local governing board. If this is the case there must be a clear rationale and an exit strategy.

If you are a local governor you will not be involved in the AGM; though some trusts invite their governors.

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

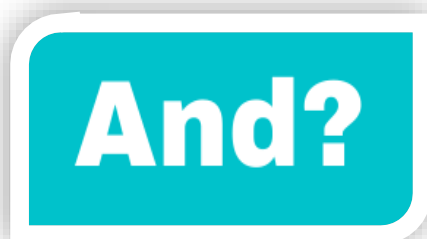
It is really important that if you know in advance that you cannot attend a governors' meeting that you submit your apologies (usually to the clerk). If you do not submit apologies for 6 consecutive months you may well find yourself suspended from the board. If you have a personal reason (such as ill 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 always 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 (which the board considers do not have merit) and the board therefore 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. It is always good to have a conversation with someone first.

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.*



There is a blog on the word And [here](#)... *At first glance, **And** may seem unremarkable—a modest word, just three letters long. However, **And** is the bridge that connects ideas, the catalyst that fosters collaboration, that invites inquiry, that seeks challenge. **And** is the cornerstone of effective governance – it should follow every question we ask – we should use it to take our conversations deeper.*

What do you think? Why not share the blog with the board?

A is for Articles of Association (AoA)

If you govern in an academy these are your principle guiding 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 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 AI

We can no longer avoid the impact and use of artificial intelligence in education and indeed in governance. There are some amazing tools out there – some of which can be used for free or come as part of another package (Governor Hub offer a new AI tool for example). AI is improving all the time but should always be used appropriately. It is not always right.

If you are struggling to find a way to word your board meeting questions why not use an AI platform to help you shape it? Don't upload your papers to an open AI platform though as there are issues with confidentiality etc.

A few interesting documents/opinion pieces are [The Rise of AI in Education Whitepaper - Bett UK](#), [Generative artificial intelligence \(AI\) in education - GOV.UK \(dated August 2025\)](#), and [Artificial intelligence in education | UNESCO](#).

AI is not going to go away but one wonders how much energy it uses!

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 depending on its value. An asset register is a key tool for managing school assets effectively, supporting accurate financial reporting and accounting. Without one, schools may struggle to monitor what assets they have, where they are located, and what condition they are in. Managing the asset register is an operational matter and not one for the governors to get involved with.

A is for Associate Members (maintained schools)

Associate Members⁴ (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. Some academy trusts allow associates but approval is usually required.

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

Top Tips for Clerks

- Check the end dates of your Associate Members and check whether they are adding anything to the board. If not why are they attending the meeting? Is there another role they could undertake – community champion or school supporter for example.
- How many Associate Members are there on the board and should some perhaps be in attendance by virtue of their role in school?

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

⁴https://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

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. Trustees should be presented with trust-wide data.

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](#) 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.

The DfE now publish attendance ‘dashboards’ which can be accessed only by school leaders but are extremely useful and can and should be shared with governors.

This [suspension and permanent exclusion guidance](#) is the latest guidance on this important aspect of attendance (although there are rumours it will be updated). If you are asked to sit on a panel please ensure that you have read the guidance. You should receive some training prior to sitting on a panel as these are not necessarily straightforward. As a first port of call why not read through the guidance and see what the responsibilities of the governors is all about?

Some questions you could ask about attendance⁵

- 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

School and trust leaders have access to a new online tool called View Your Education Data (governors and trustees do not have access as it uses pupils names taken from the daily register of attendance). The tool produces a useful dashboard which can be shared with the board and offers insights from which you can generate some questions – try not to get too operational though. Governors and trustees do have free access to [Pupil attendance in schools](#) (which is updated very regularly – the example is from August 2025). This shows that the Persistent Absentee rate for 2024/25 was 18.7% and outlines data for unauthorised absence. Attendance at school can be a complex issue so do read around the documentation before challenging information presented to you.

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

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

curriculum 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 include cybersecurity, payroll and governance. Scrutiny areas will be different in every trust depending on need and circumstance. Governance is one key area.

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.

A is for Autonomy

Governors and Trustees do not have the right to make decisions outside of the school or trust's governing documents; terms of reference or policies. Trustees and governors are guardians of public accountability, not 'free agents.' The strength of a board lies in oversight, not operational control. True effectiveness comes not from autonomy, but from assurance, challenge, and clarity of roles.

B is Belonging

There are many definitions and much written about the word belonging. There are many papers and books written about what it is to feel as though you belong. Does this definition resonate with you?

To feel a sense of belonging is to feel accepted, to feel seen and to feel included by a group of people, believing that we fit in, trusting we will be protected by them. To not feel belonging is to experience the precarious and insecure sense of an outsider⁶.

As a new governor you should be made to feel welcome and that your questions are valuable.

Belonging in a governance sense means that every governor or trustee is a recognised, valued, and made to feel an integral part of the board, with the confidence that their perspectives are welcomed, their contributions make a difference, and their role aligns with the board's shared purpose and culture.

It goes beyond inclusion and indeed being present to mean feeling;

- **Connected** – to the mission, values, and people around the table
- **Respected** – their voice is heard and taken seriously
- **Empowered** – they have the knowledge, skills, and support to contribute fully
- **Safe** – to express challenge, curiosity, or vulnerability without fear
- **Invested** – in collective responsibility and shared success

In practice, belonging is what enables a board to function not as a collection of individuals, but as a cohesive, diverse, and purpose-driven governance team. Matters such as the layout of the board room, time of the meeting, openness of the conversation; the way decisions are considered; communication between meetings and being invited to participate all contribute to a sense of belonging.

⁶ Leora Crudas CBE – Chief Executive; Confederation of School Trusts [Conference speech 2024](#)

Some suggested questions about belonging...

1. When did you last feel that your contribution made a real difference to the board's discussion or decision?
2. Do you feel you can bring your full perspective and experience into the boardroom, even when it challenges the majority view?
3. In what ways does this board help you feel connected to its purpose, its people, and the communities we serve?

Questions perhaps all boards should be asking!

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 benchmarks⁷ offered by a well-known AI platform (well, why not!?) – what do you think about the targets? Useful starting point?

	Benchmark	Why It Matters
Board Meeting Efficiency	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.
Board Member Attendance and Participation	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.
Strategic Plan Alignment and Progress	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
Policy Implementation and Review	All key policies should be reviewed and updated at least once every 3-5 years, with 100%	Regular policy reviews ensure that the organisation's governance framework remains relevant,

⁷ I asked Chat GTP for a top 5 governance benchmarks – what do you think?

	compliance with review schedules.	legally compliant, and aligned with current best practices.
Stakeholder Communication and Transparency	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.

Table 2

Top Tips

- Try not to identify too many benchmarks or Key Performance Indicators as it gets unwieldy
- Stay strategic – operational benchmarks and KPI are for school and trust leaders to worry about
- Make sure the KPIs are achievable but stretching
- A good KPI is aligned with strategic goals, measurable, actionable, clear and simple, relevant, and time bound.
- Why not look at [Financial Benchmarking and Insights Tool](#) to find info. on your school or trust?

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 even feel brave enough to start writing your own. Blogs are opinion pieces that are designed to inform, challenge and make you think. Ofsted used to publish blogs regularly and these were 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!

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...

The Academy Trust Handbook 2025 states *an academy trust is the legal entity with the board having collective accountability and responsibility for the academy trust and assuring itself that there is compliance with regulatory, contractual, and statutory requirements.*

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 must 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)
- Headteacher/Principal/Exec Headteacher/CEO
- Governors or Trustees
- 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. 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 – but meeting culture is really important. A good meeting culture is one where meetings are effective, inclusive, purposeful, and respectful of everyone's time and contributions. Many books have been written about meeting culture. See also M is for Meeting.

Top Tips

- Clerks – check who has voting rights – in some Trusts, the Trustee link representative forms part of the quorum.
- Be brave if the meeting is not quorate – it cannot make decisions if it is not.

B is for Boundaries

Understanding the boundaries between strategic and operational; between what you can and cannot share outside a meeting; between governors and trustees, and school and executive leadership can sometimes be more than a bit tricky to navigate. Often it is really clear what you can and cannot share – the clerk will always ensure that if needed there are confidential minutes for example when discussing a staff restructure or a performance issue.

If you are the chair you often need to give special consideration to what you can share with the vice chair and the rest of the board. In the vast majority of instances there is a balance between being too cosy and not sharing anything at all. If you remember to be *friendly but not friends* that can help. As chair you have to remain impartial even if you are friends with people (governors, trustees, and employees) outside of the meetings and the work of governance. Remember the standards in public life apply at all times which can be challenging!

B is for Bucket

If you hear the word bucket at a meeting it is mostly likely related to GCSEs and not to a container in which to collect water from a leaking roof. For those non-educationalists and those who do not have children at secondary schools buckets is a term used to analyse progress. It is a good idea to ask for further explanation at your meetings!

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. 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.

The DfE published new careers guidance in May 2025 which also sets What the governing body is expected to do;

The governing body should provide clear advice and guidance to the school or college leader on which they can base a strategic careers plan which meets the legal or contractual requirements of the school or college. The plan should:

- be developed in line with the Gatsby Benchmarks
- be informed by the requirements and expectations set out in this document
- show how the careers programme will be implemented
- show how its impact will be measured

Every school and college should have a member of their governing body who takes a strategic interest in careers education and guidance and encourages employer engagement. The CEC's [understanding how to create a strategic careers plan supports](#) careers leaders to ensure that the careers provision has explicit backing of governors and leaders, and that it is linked to the whole school, special school or college development plan.

Whilst this guidance is primarily for secondary schools a lot of primary schools spend curriculum time on careers as well.

C is for CEO (academy trusts only)

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. It should not be a popularity contest. Whilst there is no rule to say how long a person should be the chair⁸ common sense would suggest they should not be chair forever. The [National Governance Association](#) recommends 2 terms of 4 years but this is not statutory. Every chair must

⁸ Also chair of trustees

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 maintained school 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 Powers 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?!

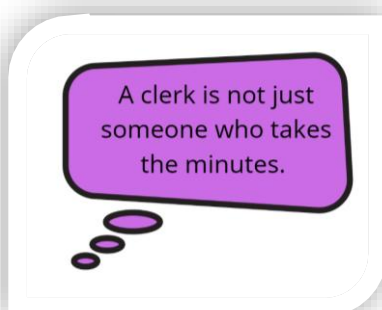
C is for Chair's Power to Act

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. 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 and in extremis.

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.



The role clerk is an increasingly professional one (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. There are qualifications⁹ you can take in clerking and academy governance.

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 your clerk between meetings but you need to know how to contact them. And if they email you – you should respond as quickly as you can.

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/CEO will meet more often than other governors and trustees and whilst 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 and what its norms and procedures are.

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, preparing the annual attendance information, and 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 and your clerks do a lot more than take the minutes of the meetings you are attending!

C is for Code of Conduct

The Code of Conduct is more than a formality – it underpins how everyone works together as a board. It matters because it:

- **Sets clear expectations** – so all governors/trustees know what professional conduct looks like
- **Promotes effective governance** – keeping governors and trustees focused on strategy, not day-to-day operations
- **Protects reputation** – ensuring those with a governance responsibility act with integrity, respect, and in line with the Nolan Principles of Public Life
- **Supports good decision-making** – by encouraging openness, respectful challenge, and collective responsibility
- **Provides accountability** – giving a shared benchmark to uphold high standards and address concerns if they arise

⁹ Qualifications are offered by the NGA and the Chartered Governance Institute amongst others.

- **Describes 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 NGA¹⁰ 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 and when it does it is not easy for anyone.

Top Tips

- 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.
- Please read the Code of Conduct carefully before signing you have read it.

C is for Cohort

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

¹⁰ 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.

- year groups
- girls and boys
- pupils for whom English is not a first language
- 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 clerk¹¹) 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 (including finance meetings) must also be published on the school website¹².

¹¹ 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.

¹² What is required to be published on line by both schools and academies is easily found on the internet

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.

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 know¹³.

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 Complaint

The difference between a concern and a complaint;

¹³ © purplegovernance.co.uk 2018

- A ‘concern’ may be treated as ‘an expression of worry or doubt over an issue considered to be important for which reassurances are sought’.
- A complaint may be generally recognised as ‘an expression or statement of dissatisfaction however made, about actions taken or a lack of action’.

It is in everyone’s interest that complaints are resolved at the earliest possible stage. Many issues can be resolved informally, without the need to follow formal procedures. Schools should take informal concerns seriously and make every effort to resolve the matter as quickly as possible.

However, there will be occasions when complainants want to raise their concerns formally. In those cases, your complaints procedure should be followed.

The DfE have advise on their website about how to manage complaints¹⁴ which is worth a read.

Top Tips

- Always follow your policy and advise any complainant or potential complainant to contact the school rather than as a governor or trustee offering to help resolve the issue yourself
- It is important that governing boards (including trust boards) remain impartial
- Undertake some training on how to handle complaints (as well as being on a panel)
- Remember confidentiality

Impact on workload

School leaders have reported that managing complaints has become a significant driver of workload. The DfE¹⁵ is working with parents and schools to better understand the challenges and explore possible solutions. They have suggested that these questions may support schools to reflect on this issue.

- does your school or academy trust have clear policies and procedures which detail how parents can make a complaint?
- are parents clear what they can or cannot complain about to the school, what informal resolution options are available, and how long it should take to hear a formal complaint?
- are leaders empowered to move complaints by parents to a more formal process when it becomes clear that they will not be able to agree on a resolution?
- does your school or academy trust analyse the workload implications of complaints?

Guidance is available at;

- [academies complaints procedures](#)
- [maintained schools complaints procedures.](#)

C is for Compliance

There are several ways of defining what it means to be compliant in terms of governance

- Legal & Regulatory adherence – (e.g., education law, safeguarding, data protection, Health and Safety, company law).
- Policy alignment – following internal policies, codes of conduct, and adopted standards set by the board/trustees
- Assurance & accountability – being able to evidence that the school or trust is meeting these requirements through reporting, monitoring, and audit
- Risk management – ensuring compliance risks are identified, monitored, and mitigated, reducing exposure to sanctions, reputational damage, or financial loss

¹⁴ Best practice guidance for school complaints procedures 2020

¹⁵ [Conversation guide for workload and wellbeing in schools and academy trusts - GOV.UK](#)

In practice for academy trust governance, *compliance* usually means ensuring the trust operates within:

- The Articles of Association and funding agreement
- Academy Trust Handbook (ATH) requirements
- Charity law, company law, and other relevant education regulations
- Internal governance procedures (scheme of delegation, policies, financial regulations, code of conduct)

In short: *compliance is about trustees ensuring the organisation “plays by the rules” – external and internal – and can prove it.*

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.

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.

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. This should cover;

- 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

It is increasingly important, in the name of transparency, that these declarations 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 – better to be safe than sorry. 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 at least annually and are increasingly published on a live up to date basis. 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

It is important to remember that the impact of Covid on our children and young people is still very evident – even in 2025 and will be for some time.

C is for Climate Change

The DfE have produced new guidance on [Sustainability leadership and climate action plans in education](#) (dated March 2025). The DfE state that ensuring schools and trust have clear leadership for sustainability in place, and a climate action plan, will help to:

- increase the confidence and expertise of your leadership team, staff, learners, and students in understanding climate change and how positive change can be achieved
- create a culture that prioritises sustainability
- share effective practice with other education settings and develop a peer-to-peer learning network
- use data to identify and prioritise action
- improve energy and water efficiency
- calculate your carbon emissions and identify ways to reduce them
- reduce operating costs
- increase resilience and start adapting to the impacts of climate change
- enhance biodiversity
- help learners develop skills and knowledge which help them to contribute to sustainability and climate change in their lives and future jobs

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 a regular item board agendas?

C is for Critical Success Factor

A Critical Success Factor (CSF) is an essential area of activity that must go well if a school or trust is to achieve its mission and strategic objectives. CSFs highlight the priorities that governors, trustees, and leaders need to focus on to ensure success. Although the term comes from the business world, schools and trusts also have strategies and mission statements. By identifying two or three of the most strategic factors, a board can sharpen its focus and monitor success more effectively. Having CSF helps a board avoid drifting away from their strategic role into the weeds of the operational activity.

Top Tips

Why not ask ...

- How do we know we have been successful? What has changed for the better?
- What do we need to continue to do to ensure improvements are sustainable and aligned with our mission and long-term strategy? (and not just a short-term gain, but embedded progress)?
- What matters most? Keep focused on this and the CSF will become part of the conversation and not an add on at meetings.

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. What do the staff, parents and children and young people say about the culture and when did you last ask?
5. 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:

- **Decision-Making Processes** - how decisions are approached, debated, and agreed, reflecting openness, inclusiveness, and transparency.
- **Communication Style** - the tone, frequency, and transparency of communication among board members and with stakeholders, and how this impacts and affects trust and collaboration
- **Accountability and Ethics** - the board's commitment to ethical standards, integrity, and accountability
- **Risk Tolerance** - the board's attitude toward risk-taking and innovation, which can either encourage proactive strategies or foster a more conservative approach
- **Diversity and Inclusion** - The board's approach to hearing and responding to diverse perspectives and developing inclusive practices
- **Conflict Resolution** - how the board handles disagreements and conflicts, whether through constructive dialogue or avoidance, and how this affects overall board cohesion
- **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

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?

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?

In the past the DfE published a Competency Framework for governors (as well as for clerks) whilst this guidance has been withdrawn there are a number of useful definition contained within the framework. The definition of curiosity is one such definition;

Under the "Principles and personal attributes" section, the framework outlines that every board member should be:

- *Curious — "Possessing an enquiring mind and an analytical approach and understanding the value of meaningful questioning.*

**Curious Questions
Matter.**

Top Tips

- 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 to be.

C is for Cyber Security and digital standards

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.*

The DfE published some digital standards for schools and academies in March 2025 called [Meeting digital and technology standards in schools and colleges - Cyber security standards for schools and colleges](#)

Top Tips

- 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.
- If you are asked to complete cyber security training even if you have done it before please ensure that you do – it is really important. None of us are immune.

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 \(GIAS\)](#)¹⁶
- 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 available. See also N for Networking.

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 or quality of education and outcomes committees) 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 Children¹⁷. 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 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.

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;

Term	Definition	Typical Use Case	Notes
Approve	To give formal consent to a proposal, policy, or plan, making it officially valid	Approving statutory policies (e.g. Safeguarding Policy, Admissions Policy)	Indicates direct accountability for the decision
Adopt	To take on and implement a procedure, framework, or approach developed internally or externally	Adopting a code of conduct, adopting a complaints procedure, adopting sector guidance	Signals incorporation into trust practice
Ratify	To formally confirm a decision already made at another level of governance or leadership	Ratifying the appointment of a senior leader, ratifying the	A safeguarding/ check mechanism; decision has been made

¹⁶ 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.

¹⁷ 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.

		election of a LGB chair; trust wide policy	elsewhere but requires confirmation
Resolved	A formal record that the board/trustees have agreed to an action	It was resolved to approve the annual accounts	Can substitute for “approve” in minutes; more formal in legal/charitable governance contexts.

Table 3

Remember to ensure that whichever term(s) you use you are consistent so that minutes are clear and decisions auditable.

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

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 2025.

Think about who is attending your board meetings and why. It is not always appropriate to have the whole of the senior leadership team at a board meeting – this tends to happen more in Single Academy Trusts.

Anyone acting like a trustee or director without formal appointment could still be disqualified from being a trustee or director. They also need to declare any interests and related party transactions. The ways to avoid anyone becoming a de facto trustee include;

- Having a clear recruitment process for trustees,
- Ensuring those who routinely attend trust board meetings have a clear purpose and remit and recognise that they are not a trustee and do not form part of the meeting quorum,
- That all those who attend or report to the board have read and understood the governance documentation and the Academy Trust Handbook.

D is for Delegate

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

Governors and trustees 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.

It is good practice for the chair to report back to the next meeting on any actions taken.

In maintained schools there is a financial scheme of delegation – this needs to be approved on an annual basis. It is good practice to review the delegated financial limits – i.e. the level at which a Headteacher must have the spend approved by the board. Too high and this could leave the school open to mismanagement (unfortunately this happens); too low and the school cannot function effectively.

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.

Distributed leadership builds capacity throughout the school, trust, or governance board; it encourages open mindedness and innovation; it reduces an over-reliance on top down leadership; supports succession planning; reduces workload; and supports sustainable and resilient organisational growth. What's not to like?!

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.'*¹⁸ 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

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.

¹⁸ [Equality and Diversity and Governance.pdf \(aoc.co.uk\)](#)

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 guidance¹⁹

Early help is support for children of all ages that improves a family's resilience and outcomes or reduces the chance of a problem getting worse. It is not an individual service, but a system of support delivered by local authorities and their partners working together and taking collective responsibility to provide the right provision in their area.

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](#).

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;

- age
- disability
- gender reassignment
- marriage and civil partnership
- pregnancy and maternity
- race
- religion or belief
- sex
- sexual orientation

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.

¹⁹ [Working together to safeguard children 2023: statutory guidance](#)

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.

The DfE expects academy trusts to manage their school estate strategically and effectively and maintain their estate in a safe working condition and has produced specific guidance – called ‘*School estate management standards Policies and processes required to manage the school estate effectively*’ dated April 2025²⁰.

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 in a maintained school 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
- Values are really important – if your meetings never refer to the school or trust values and you do not know what they are – is the board effective?

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 fair²¹. 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

²⁰ [School estate management standards](#) further links to key documents are available in the ATH 2025 – para 1.20 onwards

²¹ There is some independent advice available here ([IPSEA](#)) [Independent Provider of Special Education Advice](#). Other providers are available. Also see Special Needs Jungle.

fair treatment of pupils from groups who are vulnerable to exclusion. It is essential that you have read and discussed the school's Behaviour Policy²² 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 staff²³.

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
- 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 and trustees 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

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.

²² Some schools give this policy another name so it is worth double checking

²³ NGA guidance – paywall

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.

You will often be presented with a number of supporting documents alongside the Headteacher or finance reports. These documents are important and you need to be aware of the contents before you make a decision.

Top Tip

- Set aside some time to read the papers for the meeting so that you have an awareness of the contents before you make a decision. If you don’t understand something ask but do give school leaders time to respond.

There is a briefing note on why having an evidenced informed approach to governance is important in the Appendices. Please feel free to share this with your boards.

E is for Extra Curricular and Enrichment

This refers to the wide range of activities, opportunities, and experiences that sit beyond the core curriculum but are essential for developing pupils’ character, confidence, and cultural capital. Extra-curricular and enrichment provision includes clubs, sports, arts, leadership opportunities, trips, and experiences that broaden horizons and help every child discover their interests and talents. High-quality enrichment is not “nice to have” but a vital part of equity and inclusion, ensuring all pupils – particularly those from disadvantaged backgrounds – can access the same breadth of opportunity.

Questions governors could ask:

1. How does our enrichment offer reflect our school/trust values and ensure access for disadvantaged and SEND pupils?
2. How do we measure the impact of enrichment on pupil outcomes, wellbeing, and personal development?

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 disadvantaged²⁴ and SEND pupils are accessing these 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 ...



²⁴ There must be a better word than this!

Have you ever been in a meeting where children and young people are not mentioned? Oh dear.

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

You may be asked to give some feedback after you have done a governor or trustee visit. Feedback could be positive and negative and is a useful indicator of impact. You may also be asked to share your draft report with school leaders before sharing it more widely. Th

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.

Some good practice in giving visit feedback;

- channel feedback through the chair/headteacher before it goes wider.
- link comments to agreed focus (e.g. safeguarding, SEND, curriculum intent) rather than personal observations. Remember you are not undertaking lesson observations.
- use neutral, professional language rather than judgmental phrasing.
- keep it factual and strategic – not operational or advisory.
- record it formally in the visit form/report so it feeds into governance evidence, try not to have corridor conversations where you could possibly be reporting hearsay but always be aware of culture.

Remember...

- governors are not inspectors - a visit is about understanding, monitoring, and supporting – not judging. feedback mustn't come across as an "inspection report" or personal critique of staff.
- risk of undermining school leaders - if governors give feedback directly to staff or in a way that contradicts leadership messages, it can blur lines of accountability and undermine the Headteacher's authority.

F is for Finance

Every Trust and maintained school board needs to regularly review the school budget²⁵. This is not always 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 and trustees 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. Ask yourself – on a scale of 1 to 10 how strategic was your last meeting? Now, keep track of this throughout the year.

There are a number of finance policies 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. It is always best to check with the clerk. 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 good idea to have a

²⁵ 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.

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. The more ‘eyes’ on a key policy such as finance the better.

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. Another important aspect of finance meetings is to ensure that minutes are accurately recorded, as auditors may review them. You don't need to be a financial expert to join the finance committee, so don't be discouraged.

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 fees²⁶.

Some additional definitions that you might find useful;

- Novel transactions are those of which the academy trust or school has no experience, or are outside its range of normal business,
- Contentious transactions are those that might cause criticism of the trust by Parliament, the public or the media. Some call this the ‘front page of the local media’ test i.e. *if this decision, action, or behaviour were reported on the front page of the local newspaper tomorrow, would we still feel comfortable with it?* Trust in governance depends on demonstrating integrity, fairness, and transparency after all.

F is for Foundation Governor (some Trusts refer to Foundation Governors as Church Governors).

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.

F is for Funding Agreement

The funding agreement is a legal contract between your academy trust and the Secretary of State. It sets out funding arrangements, obligations of both parties and the termination provisions. The funding agreement is a legally binding contract.

The agreement sets out the 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 such as these [research documents](#). If you clerk in the FE sector the AOC has some really useful resources which you can download and save.

²⁶ [How does school funding work and how does the Budget affect it? – The Education Hub \(blog.gov.uk\)](#)

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. The only exceptions are disciplinaries and awards. You should never see individual grades or personal data such as staff salaries.

Top Tips

- 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 and you can now add the name of the Governance Professional (although this is not mandatory at the moment).

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.

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.

This table sets out some things to think about in terms of challenge.

	Deficit of Challenge	Healthy Challenge
Questioning	Few or superficial questions; mostly operational or seeking clarification of meaning; accepts reports at face value;	Probing, strategic questions; evidence-based; asks “why” “so what?” and “what’s the impact?”
Evidence Use	Relies solely on leadership reports; little triangulation and no independent governance visits	Uses multiple data sources (staff, pupils, benchmarking, governance visits) to form ‘independent’ view
Decision-Making	Approves proposals without scrutiny; lacks rationale – <i>not wanting to rock the boat</i>	Decisions are tested against data, strategy, values, and risk – there is a clear decision pathway
Discussion of Risks	Avoids sensitive or difficult topics; discomfort prevents debate; delays decisions; accepts what is presented without challenge	Openly explores risks, challenges assumptions, and considers worst-case scenarios
Board Culture	Homogeneous thinking; rubber-stamping; low accountability; low attendance at meetings	Diverse perspectives; constructive debate; culture of accountability and curiosity
Outcome Focus	Focus on activities, processes, or compliance; little or no attention to impact	Focus on outcomes, pupil progress, and long-term sustainability; strategy at the heart of decision making
Documentation	Minutes show agreement without evidence of questioning	Minutes reflect clear debate, questions asked, evidence considered, and rationale for decisions articulated.

Table 4

G is for (own) Goal

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

- 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.

- be clear on your role and remit. focus on strategic oversight rather than operational detail. if a discussion drifts into day-to-day management, politely steer it back to the board's role.
- prepare and ask strategic questions. Before meetings, review papers and think about key areas of challenge, risk, and impact. Asking informed questions helps avoid rubber-stamping and demonstrates active governance.

G is for Going Concern

Academy Trusts

Simply put the term, 'going concern' is a view taken by the DFE 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.

Maintained Schools

In a maintained school, being a going concern means:

- the school is expected to remain open and continue delivering education.
- it has sufficient resources to meet its obligations (e.g. payroll, suppliers) as they fall due.
- there are no plans or significant doubts about closure, amalgamation, or transfer to academy status.

If there are material uncertainties—like severe financial distress or falling pupil numbers—that cast doubt on the school's ability to continue, these must be disclosed in the financial statements. It is always important to receive updated information on pupil numbers as funding is predicated on the number of pupils at the school.

Budgets are increasingly under pressure and some maintained schools find themselves in a deficit budget position. In this situation they may be able to agree **a licensed deficit**. **A licensed deficit** is a formal agreement between a maintained school and its local authority that allows the school to operate with a planned budget deficit under strict conditions. Such a situation will bring additional scrutiny and governors will have to ensure that their finance meetings are properly clerked.

Key features include:

- Deficit limit: typically capped at 5% of the school's annual budget share.
- Recovery plan: the school must submit a detailed and credible plan outlining how it will return to a balanced budget within an agreed timeframe. perhaps set up a working party if you are in this position.
- Approval process: The local authority must approve the deficit and monitor progress. They may allocate a named member of staff to support the school.

A licensed deficit may be requested when a school faces unavoidable financial pressures—such as declining pupil numbers or unexpected costs—but still has a viable long-term outlook. This helps schools avoid sudden cuts that could harm educational provision, while ensuring accountability and financial recovery.

G is for Governor

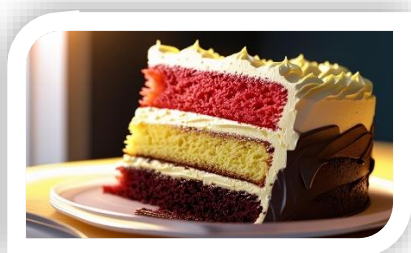
This word can be quite confusing to say the least.

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 of your cake 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.



You deserve some cake for reading the Glossary this far – you are about half way through!

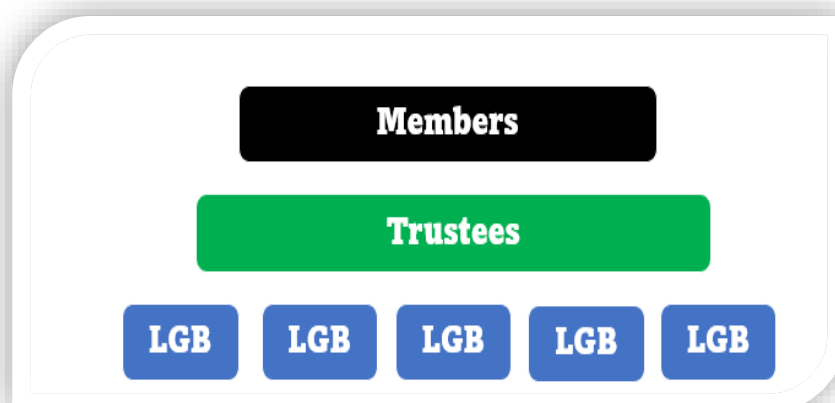
Each governance layer has different responsibilities as set out in the Scheme of Delegation. The Academy Governance Guide is a good place to start and has some helpful descriptions about what each layer should do. It is important that there is a communication plan or flow chart to show how each of the 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!



Sample structure – sometimes LGBs have other names

G is not for Guess

In order to avoid guess work (although there is often place for a good guess based on intuition) being prepared is the best antidote to making too many guesses. 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 the uncertainty that many, if not most, schools face in the coming academic years.

H is for Headteacher

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.

Alongside H is for Head we have D is for Deputy Head. There is no legal requirement for a deputy headteacher and schools and academies run with a variety of structures. When the headteacher is not present in school for any reason their deputy steps into the role. There are exceptions as to what decisions a person deputising can make. If your school is lead by a deputy for any length of time it is best to seek HR and/or advice from the Local Authority. This is an important document [School teachers' pay and conditions guidance 2025](#)

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. While it is up to governors to decide on the content, it is crucial to be reasonable in all 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 Tips

- In terms of Headteacher Reports (and in fact CEO reports – try to think *less is more*).
- Governors should not expect to be spoon fed either the questions or answers by the Headteacher but a few signposts are appreciated.

H is for Happy

Whilst governing is challenging at times 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. Some trusts use happiness as a key metric. What do you think?

H is for HR (Human Resources)

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.

In a Voluntary Aided (VA) school, the employer of the staff is the governing body of the school. The governing body directly employs all staff (teachers and support staff) and this includes responsibility for contracts, pay, discipline, appraisal, and recruitment. The governing body, as the employer, works in partnership with the local authority (LA) for funding allocations (mainly delegated budget) and may follow LA policies for pay and conditions, but the legal employer is the governing body.

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 therefore 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 to you over time. If however, governors and trustees cannot articulate impact in any way – i.e. the positive difference they are making then it may be advisable to seek some external support.

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 Tips

- Use the Action Log to help shape your discussions
- Agree as a board what actions can be closed once they have been completed and which actions are ongoing and have an intended impact that can be measured. Do not have too many of the latter though otherwise governance becomes unwieldy.

I is for Information Governance

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.

I is for Induction

Induction can take many forms. All governors and trustees 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? 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. 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 Year 4 or the geography department.

You should have a school based induction about safeguarding as well which sets out the school's procedures

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

I is for Innovate

Put simply do not change something that works just for the sake of change. Innovation i.e. not standing still and accepting the status quo is a good thing, but constant change is not healthy governance practice. Think about what is working well and do more of it.

I is for Instrument of Government

In a maintained school²⁷ 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.

²⁷ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/640562/The_constitution_of_governing_bodies_of_maintained_schools_2017.pdf

J is for Just

There is **no such thing** as *just* a governor or trustee. 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 only turning up for the biscuits (presuming your meetings have some form of refreshment – not all do).

J is for Justice

Sitting alongside the Nolan Principles but not as widely known is the framework for ethical leadership in education. Here we find other ways to demonstrate leadership with values such as trust, wisdom, courage, optimism, service and kindness. These are fairly self-explanatory. The seventh value is justice. The framework defines this as *leaders are fair and work for the good of all children enabling them to lead 'useful, happy and fulfilling lives'*.

If you govern in the Catholic sector there is a key focus on social justice and if you are new to the role as governor this will be explained to you during induction.

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 [2025](#); 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.

To ensure it is convenient, always make an appointment before visiting the school, unless you have been invited. As a governor or trustee you not have the door access codes and be able to enter the school premises unannounced.

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; especially the pupils.

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. It is dated 2018 and is still valid.

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		Early years	
4 to 5	Reception	Early years	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.

- what KLIs have been identified for our school, and why?
- what evidence is being used to monitor progress in these areas?
- how are governors assured that any actions linked to a KLI are effective?
- if a KLI shows areas of concern, what is the plan for improvement, and how are resources allocated?
- how do KLIs relate to our school improvement priorities and strategic objectives?

Of course, you can define your own KLI when doing governance visits as well.

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.

Some questions you could ask;

- do our KPIs clearly measure progress toward our strategic objectives, and are they meaningful for governance oversight rather than just operational activity?
- how regularly are KPIs reviewed, and what evidence do we use to assess whether they are driving improvement toward our vision

L is for Leadership

Ofsted²⁸ 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*²⁹. Or this over time,

²⁸ Please note that the Ofsted inspection framework is changing and at the time of writing – August 2025 – Ofsted inspectors are still undergoing training on the new framework.

²⁹ 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.

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 Tips

- There are a myriad of books written about leadership – why not pick one at random and use it as a starting point for discussion!
- Don't forget the Ofsted inspection framework is changing.

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. In secondary schools there must be someone linked to careers. The DfE guidance on working together to improve school attendance³⁰ sets out clearly in Chapter 3 the 'expectations of academy trust boards and governing bodies of maintained schools.' The guidance states *strategies for improving school attendance begin at board level, therefore all academy trust boards, and governing bodies of maintained schools should take an active role in attendance improvement, support their school(s) to prioritise attendance, and work together with school leaders to set whole school attendance cultures.* Perhaps you can ask about attendance at every link visit – especially if you are the safeguarding and/or SEND link ?

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.

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? is it based on the skills audit?
5. what training is available?

³⁰ Working together to improve school attendance (applied from 19 August 2024); Chapter 3, para 74

6. have the named governors or trustees the capacity to do the visits?
7. do staff know what to expect from a governor visit and when to escalate if they think the visit was inappropriate in any way?

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 (see also AGM)

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 Members³¹. 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.

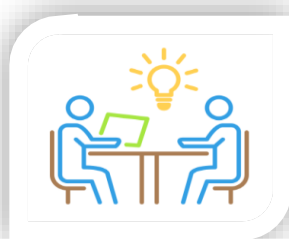
The National Governance Association publishes a useful guide for Members and there is important information on this key layer of governance in both the DfE Governance Handbook and the Academy Trust Handbook.

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

M is for Meetings

Some boards have numerous meetings. While there is no definitive number of meetings that is right or wrong, holding meetings just for the sake of it is not advisable.

Any conversation about the school between two or more governors can be considered a meeting, and a record should be kept even if formal minutes are not taken. The pandemic highlighted the role, purpose, and organization of meetings, leading many boards to continue holding 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).

³¹ 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>

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 apart from the confidential ones³² 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.

There is a great book called *The Art of Gathering*³³ in the introduction the author offers her thoughts on meetings – “*When we don't examine the deeper assumptions behind why we gather, we end up skipping too quickly to replicating old, staid formats of gathering. And we forego the possibility of creating something memorable, even transformative.*” Having a real and clear understanding of why we meet as governors and trustees is really important and is something we could perhaps give some more thought to; after all we are governing for the benefit of the children and young people in our school.

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.

Minutes 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).

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

³² 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.

³³ *The Art of Gathering* – Priya Parker, Penguin. ISBN 978-0-241-97384-4; 2019

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.

Top Tips

- Minutes are a collaborative record of the meeting – they must be impartial.
- Minutes should not be a verbatim record of who said what; neither should they run to 20 pages (unless it is a panel) or be full of extra words, white spaces, or confusing colour coding. Some minutes look like a riot in a paint factory.
- Taking good minutes is harder than it looks – remember to check in with your clerk about their workload and wellbeing. They will appreciate being asked.

M is for Multi-Academy Trust

Colloquially known as MATs and increasingly referred to as academy trusts, Multi-Academy Trusts have been around for some time and they are schools that operate outside the control of the Local Authority. A MAT is a group of schools³⁴ working in collaboration as *one entity* to improve and maintain 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

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**.

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. NLG³⁵ 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.

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

³⁴ 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.

³⁵

settings. NASCC offers both free and paid for services, conferences and webinars and further information is available [here](#). It is independent.

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 and trustees 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!

If you get the opportunity to attend a governance network or conference – try and go along. You never know who you may meet!

N is for No-show

Governor attendance must be published on the school website.

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. 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 board³⁶.

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 or trustees 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*

³⁶ 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...

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 significant 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.

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.

As the inspection handbook is changing you should ensure that you ask for some specific governor training on the new framework.

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? Ask why.

O is for Oversight

Governors and trustees 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...

Passive governance happens when a board focuses on rubber-stamping and compliance, defers to rather than confers with management and reacts to issues rather than providing proactive, strategic leadership and robust challenge.

You know when your board is passive when the board 'norm' is

- reactive not proactive,
- it rubber stamps decisions,
- there is an over-reliance on management,
- there is minimal strategic engagement – i.e. a trust board that looks at detail an LGB should be scrutinising rather than taking a trust wide view,

- when there is limited challenge or when challenge is about process not outcome,
- governors and trustees have a tick box mentality with a short term focus only.

Can you think of any other attributes of a passive board?

The table below offers a perspective on the difference between active and passive governance. Does anything resonate with you?

	Active Governance	Passive Governance
Questioning & Challenge	Asks probing, evidence-based questions; tests assumptions; seeks clarification	Accepts reports and recommendations without question; rubber-stamps decisions
Strategic Oversight	Focuses on long-term goals, vision, and school improvement; connects decisions to strategy	Concentrates on operational details or immediate issues only; lacks strategic focus
Accountability	Holds leaders to account for pupil outcomes, finances, safeguarding, and compliance	Rarely checks performance or follows up on actions; assumes all is fine
Evidence Use	Reviews data from multiple sources; triangulates information; tracks KPIs and impact	Relies solely on information provided by leaders; does not verify or analyse evidence
Risk Management	Identifies, discusses, and mitigates risks; actively monitors compliance	Ignores or is unaware of potential risks; assumes risk is being managed
Board Engagement	Participates fully in meetings; contributes to discussions; prepares in advance	Minimal participation; attendance without contribution; unprepared
Culture & Improvement	Encourages continuous improvement; constructive challenge; models high expectations	Low engagement; avoids difficult conversations; misses opportunities to influence culture
Documentation	Minutes accurately reflect discussion, challenge, and decisions; clear actions assigned	Minutes show agreement only; little or no reflection of discussion or questioning

P is for Pecuniary and Business Interests

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.

Maintained school governors³⁷ 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.

A pecuniary interest is any financial interest held by a trustee, governor, or member — either directly or through a close connection — which could influence their decision-making in their role.

³⁷ [The constitution of governing bodies of maintained schools](#)

This includes (but is not limited to):

- employment by, or payment from, the trust or school
- payment from a company or supplier that contracts with the trust or school
- shareholding or ownership in a company that might benefit from the trust's decisions
- interests of close family members or partners in such arrangements

Governors and Trustees must withdraw from any meeting where there is a conflict between their duty and their pecuniary interest. And this should be clearly identified in the minutes.

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.

The key document for 2025/26 for maintained schools is [School teachers' pay and conditions guidance 2025](#), (section 3 provides the details). Not all academy trusts follow the STPCD but most do.

This website [School teachers' pay 2025 | Local Government Association](#) offers some useful background.

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.

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.

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

Academy Trusts usually, but not always, 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 Association³⁸ offer some free webinars as do other providers so it is worth investigating.

Top Tips

- All information presented to the board on pay should be confidential – you do not need to know salary details of each staff member; this is operational.
- Ask about benchmarking against similar schools
- Ask what is the proportion of the budget spent on staffing (ask about all staffing not just teachers)

P is for Period Poverty

There is a national charity called Period Power that seeks to raise awareness of the impact of period poverty. You can find information at www.periodpoverty.co.uk. Whilst not governance per se it is an important issue, alongside your school or trust menopause policies that impacts on the wellbeing and attendance across the school community. You may also be interested in an article on attendance [available Period pain and heavy bleeding linked with lower school attendance and GCSE results – new study](#).

³⁸ [Impactful executive leader performance management | National Governance Association \(nga.org.uk\)](#)

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.

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 is 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.

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. 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.

The DfE used to publish a list of statutory policies – this is no longer the case. You can find information about policies in the Maintained School Governance Guide, the Academy Governance Guide, and the Academy Trust Handbook.

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

P is for politics with a small p

It is important that everyone's views are respected around the board table. We do not have to agree with each other all the time (it would be most dull if we did) but we must abide by the school or trust code of conduct, meeting etiquette, and the Nolan Principles.

In the Academy Governance Guide there is specific reference to political impartiality and the curriculum. If you are interested there a document called Political impartiality in schools (dated March 2025) that sets out Role of local authorities, school proprietors, academy trusts and headteachers and includes a number of useful hyperlinks.

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!

If a meeting is getting heated – it is okay to ask for a break.

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 \(www.gov.uk\)](https://www.gov.uk/government/prevent-duty-training)³⁹

P is for Primary

In our governance context the word primary refers to primary schools, the educational settings for children typically aged 4–11 years, covering early years and Key Stages 1 and 2. It does not refer to “primary data” or any source information.

P is for Pupil Voice

This is so obvious that 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 where 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.

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 EAL⁴⁰. 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.

Governance exists to make sure our schools deliver the best possible education, within the law, with integrity, and for the long-term benefit of children and communities; therefore we need to be really clear as to the reason we meet as governors, what decisions we need to make and why, and what we can and cannot afford to do.

³⁹ This hyperlink cannot be edited.

⁴⁰ English as Additional Language

In an academy trust where the Articles of Association are the founding documents there is a clear reminder of the purpose of the trust - to advance education for the public benefit, mainly through establishing, maintaining, carrying on, managing and developing schools which offer a broad and balanced curriculum. In terms of public benefit

- trusts must avoid activities that are for private gain.
- resources should be used wisely for the greatest pupil impact,
- where possible, trusts can also extend benefits to the community (e.g. use of facilities, partnerships).

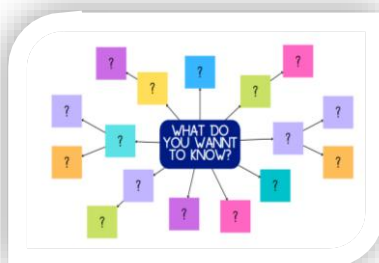
The same 3 points also apply to maintained schools as well.

Q is for Questions

Curious Questions Matter. Not all questions are curious but all seek clarification. Diverse questions can lead to deeper insights and more comprehensive discussions.

It is a good idea to prepare your questions in advance – to use the Headteacher's report as a basis (but not the sole basis) for your questions and ensure that all pertinent 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).



Minutes that show lots of questions have been asked but none of them were insightful, challenging or sought a deeper response could be an indicator of an ineffective board. If the only questions governors are asking are what does an acronym mean or what date is a school event then again this could be an indicator of a lack of confidence, poor quality documentation or a misunderstanding of the strategic nature of effective governance.

Top Tip

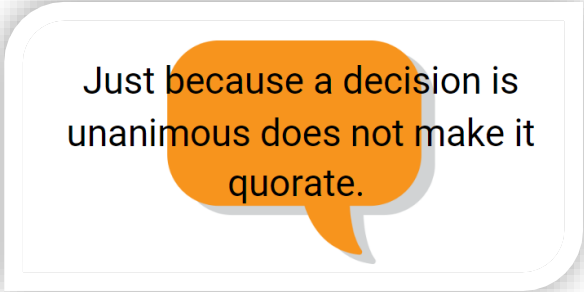
- Take a set of minutes from 12 months ago – look at the questions. Are they strategic or operational? Seeking clarification or offering challenge? Confirming information or offering a different perspective?

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?⁴¹ 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, ensures a range of views are heard,
3. Accountability and transparency
4. Demonstrates 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

⁴¹ <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 References

When appointing governors and trustees, an increasing number of schools and trusts seek references. This is to ensure candidates possess the integrity and skills required for effective governance.

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. RPT also apply in maintained schools.

The DfE have updated their guidance from 01 September 2025 - [here](#).

R is for RISE

RISE teams are new. RISE stands for Regional Improvement in Standards and Excellence and the aim is to break the link between young people's backgrounds and their future success.

At the core of RISE are the RISE advisers, who are educational experts with direct experience improving schools. RISE advisers work as part of a wider RISE team within the Department for Education (DfE).

RISE teams will operate at 2 levels:

- providing bespoke targeted interventions to eligible schools
- being a universal service to all schools

For targeted intervention, RISE advisers will engage with the eligible school and its responsible body to consider the school's specific improvement needs, as identified through Ofsted inspections. Where appropriate, RISE teams will arrange for a high-quality organisation to work with a school to support improvement.

RISE teams will prioritise supporting stuck⁴² schools that are eligible for targeted intervention.

There is more information [here](#).

⁴² defined as a school that was graded Requires Improvement or equivalent at its most recent Ofsted inspection, and was also graded below Good at its previous inspection and is still within the same structure

R is for Remuneration (an oft misspelt word!)

Remuneration means **the total pay, benefits, or financial reward** given to someone for their role or work. In governance, it most often refers to:

- Executive leaders (e.g. CEO, CFO, headteachers) – their salaries, pensions, and any bonuses.
- Trustees and members – who normally *do not* receive remuneration, except for allowable expenses, as set out in charity law and the Academy Trust Handbook

Some trusts have a specific committee to discuss and agree remuneration. The approach that should be taken to remuneration is;

- any pay (particularly for executive leaders like the CEO⁴³, CFO, or headteachers) must be defensible and proportionate; it should also follow the pay policy
- boards should be able to explain why the level of pay is appropriate compared with similar trusts/schools. Regular benchmarking is important
- remuneration decisions must be openly recorded in board minutes
- executive pay over £100,000 (or multiple high salaries) attracts public and DfE scrutiny. This includes pension contributions – this must be published on the website
- trustees themselves normally receive no remuneration (only reasonable expenses) – this protects trust funds and public accountability
- decisions on executive pay should be made by a remuneration (or pay) committee or by trustees who are not conflicted. Governors and trustees should not be involved in setting teacher pay for example
- no individual can be involved in setting their own pay
- boards must follow the Academy Trust Handbook (section on “Executive pay and benefits”) and charity law
- the DfE expects trusts to be able to show evidence that remuneration represents value for money and supports the trust’s educational objectives

Top Tips

- If you involved in the remuneration or pay committee you must not be a staff governor
- Minutes should clearly set out any rationale for decisions
- Follow the policy
- Agree your terms of reference for the committee at the beginning of the academic year
- If you are a governor on an LGB check your trust’s documents to find out how or if the LGB or equivalent is involved.

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.

⁴³ If you are a trustee this is an important read [Setting executive salaries: guidance for academy trusts - GOV.UK](#)

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 – 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. Some trusts have a trust wide safeguarding lead – this person takes a strategic view of safeguarding across the trust.

S is for School Business Manager/School Business Leader/Bursar

Staff who manage and lead finance are integral (underlined 3 times in bold) part of the senior leadership team. SBM/SBL 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.

In an academy trust there will be a Chief Finance Officer or Chief Operating Officer supported by a Head of Finance.

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 Local Authority 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
- pupil outcomes

S is for Stakeholder

The dictionary definition of stakeholder is someone who has an interest in something, which in the context of an academy trust means any individual or group affected by, or able to influence, the trust's work and outcomes.

Internal stakeholders

- Local governing committees (if applicable)
- Pupils
- Senior leadership teams
- Staff (teaching and support)
- Trustees and members

External stakeholders

- Charitable and voluntary organisations
- Department for Education (DfE)
- Diocese/parish council
- Education & Skills Funding Agency (ESFA)
- Employers and local businesses
- Higher/further education institutions
- Local authorities
- Local communities

- Ofsted
- Other schools and trusts
- Parents and carers
- Suppliers and service providers

Can you think of any other groups?

Top Tip

One useful way to identify your stakeholders is to map them . Plot stakeholders on a 2x2 grid:

- High interest / High influence → manage closely (e.g., DfE, ESFA, Trustees, Parents)
- High interest / Low influence → keep informed (e.g., Pupils, Staff, Local community)
- Low interest / High influence → keep satisfied (e.g., Ofsted, Local authority)
- Low interest / Low influence → monitor (e.g., some suppliers)

1. What does the grid look like?
2. Is it balanced?
3. There are further examples in the appendix.

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 Spielman, the former Chief HMI, told governors in June 2019⁴⁴ 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.

There are however a range of views on whether governors need to see the detailed SCR. What do you think?

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 media⁴⁵ 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

⁴⁴ Speech to the NGA Summer Conference 2023

⁴⁵ [Cyber security in schools and trusts | National Governance Association \(nga.org.uk\)](#) – requires a log in

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 Tips

- do not to make governance decisions by WhatsApp – it is not appropriate! It is ok to agree to change the date of a meeting but not to approve the budget!
- remember all our digital transactions have a 'footprint.'

S is for Spelling Mistakes

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, irrespective of where they govern, 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

Staffing and employment advice for schools dated September 2024 remains extant. The guidance reminds governing bodies, including academy trusts that they 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; in fact is it wise to do so.

S is for Standing Items and Orders

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.

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 the diagram on the next page which is 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 or SEND (hint - everyone on the board should know something)? We should all begin, if we have not done so already, to establish and maintain 'a culture of succession' and have in the words of the NGA *ongoing, honest discussions about succession planning*⁴⁶ 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.

Top Tips

- If possible plan early and plan ahead
- Identify successors early and develop their skills and interests
- Consider mentoring and shadowing
- Succession planning is not a one off activity and takes effort
- Use your skills audit effectively – again this is not a one off activity

⁴⁶<https://www.nga.org.uk/News/NGA-News/Jan-2018-Mar-2018/Preparing-your-Board-for-the-future---new-guidance.aspx>

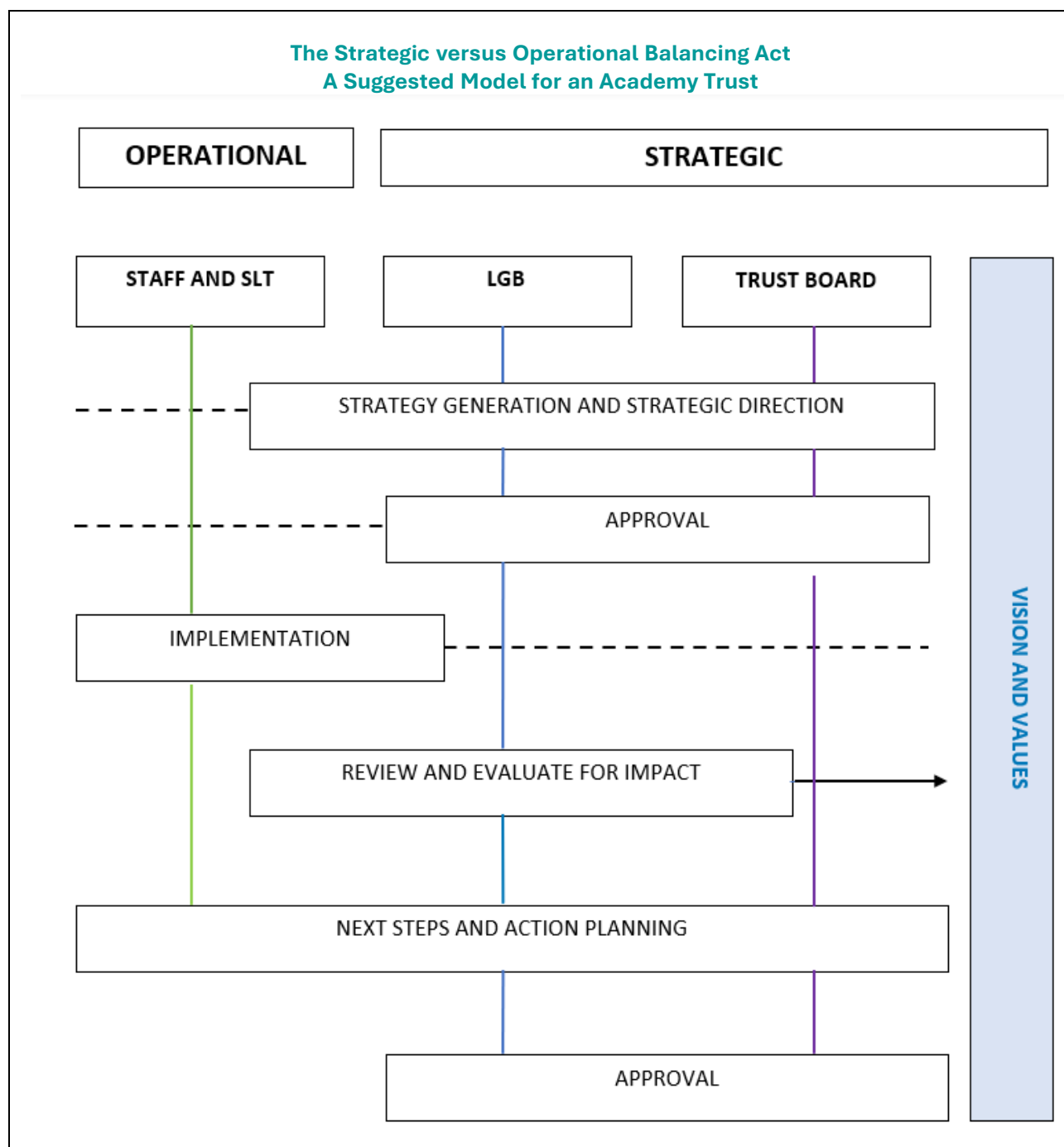


Table 7

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 and were replaced by a network of [Teaching School Hubs](#). This too has changed!

In August 2021, the DfE launched a refreshed cohort of National Leaders of Governance who have a different system leadership role and function to the 'original' NLGs 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. Do please get in touch we'd love to hear from you (declares an interest!)

In 2025 there are no NLGs at all

System leadership is about;

- not being insular, focusing beyond one's own school or trust
- collaborating across schools and trusts to build collective capacity
- improving education quality at system or network level, not just school-by-school or trust by trust

Whilst there may not be formal support for governors and trustees any more but we can and should help each other as best we can.

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 and even free 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 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](#) guide, 'The Essential Trustee' is an important read. 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 elected⁴⁷ 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 Aided⁴⁸ (VA) Church of England school, for example, governors have some additional responsibilities. It is important that you understand these responsibilities
- 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. The vast majority of trusts do not have LA governors
- 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
- other persons may (may not will) be invited to attend at the request of the board⁴⁹

Each type of governor has a term of office. This is usually 4 years but can be less. It cannot be more without either being re-elected or re-appointed. 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.

Top Tip

- Remember your clerk is not a governor and must not take part in or influence decision making; it is the clerk's responsibility to offer advice and guidance but to remain impartial. An analogy – us clerks can advise you not to jump of the cliff but if you chose to do so we will minute that we advised you not to but you did it anyway. Let us hope you do not.

T is for Type of School

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

⁴⁷ Top tips on running parent and staff elections. [SBW Governance - Free Downloads](#)

⁴⁸ 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>

⁴⁹ [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013 - part 4](#)

[Faith schools](#)
[Free schools](#)
[Academies](#)
[City technology colleges](#)
[State Boarding schools](#)
[Private schools](#)
Alternative Provision

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 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

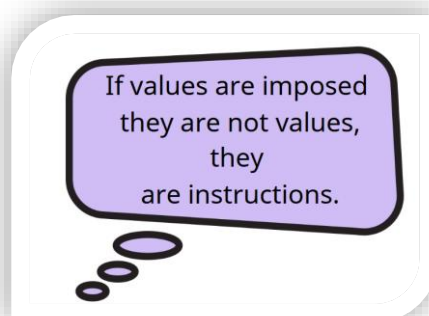
It is always good to ask questions about what looks unusual. Be curious but do not worry too much about outliers in the data but always worry about outliers in terms of safeguarding

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 or on a pen then you may have a problem.

Some thoughts on values and strategy (i.e. the first core function of governance);

- Values set the direction of strategy – anchoring strategy in values means any change should feel consistent and purposeful, not reactive or hasty
- Values express who you are and what matters most (e.g. equity, inclusion, aspiration, integrity).
- Strategy is how you get there – the choices and priorities that turn values into action. If a trust's values emphasise inclusion, the strategy will prioritise SEND investment, early intervention, and inclusive curriculum design
- Values act as a filter for decisions
- In governance, many strategic options can look attractive. Values help boards test alignment: “does this decision reflect what we stand for?”
- Focusing on your values should help avoid “mission drift” or chasing opportunities that might weaken long-term integrity
- A strategy rooted in values helps to reassure staff, parents, pupils, and regulators that decisions are not just financially or operationally sound, but ethically grounded
- Values shape risk appetite – a board's tolerance for certain risks (e.g. growth, finance, innovation) should reflect its values
- If community is a core value, the board may be more cautious about rapid trust expansion that could weaken local relationships

A strong board ensures every strategic decision can be traced back to its values — so the “what” and “how” always serve the “why.”

In short ***values are the compass; strategy is the route we take.***

What do you think?

W is for Website

School and trust 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.

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 the former 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

A useful website about teacher workload is available [here](#).

In July 2025 the DfE published a [conversation guide for workload and wellbeing in schools and academy trusts](#). It poses 4 questions for those with a governance responsibility;

1. how do governors and academy trustees support leaders to make strategic prioritisation decisions where there are competing demands?
2. how do governors and academy trustees monitor the workload of school leaders and staff? How do they know this monitoring is effective and what actions are taken where workload issues arise?
3. how do governors and academy trustees encourage a positive culture towards workload and wellbeing for all staff?
4. are reporting requirements (such as the headteacher report) as streamlined as possible and focused only on essential information?

X is for No Excuses

No such thing anymore. It's no good telling Ofsted or the auditors 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* which is not necessarily a good look!

Y is for You

Your voice is important. As a new governor or trustee you will bring a fresh perspective. Remember it is okay to enjoy your new role. 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.

Contact Information

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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
ChIN	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
EHE	Elective Home Education is a term used to describe a choice by parents to provide education for their children at home (or elsewhere) instead of 4 sending them to school full-time.	
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 ⁵⁰	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	

⁵⁰ The GAG is made up of your:

- School budget share
- Minimum funding guarantee (MFG)

This is set out in the [academy general annual grant allocation guide: 2025 to 2026](#).

NLE	National Leader of Education	
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	Also Alternative Provision
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	Right of access ICO
SATs	Standard Assessment Tests	KS1 and KS2
SCR	Single Central Record	
SDP	School Development Plan	Sometimes called improvement plan or academy 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

National Association of School and College Clerks – a new independent organisation for clerks and governance professionals 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.

Risk factors in poor decision making			
	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

Why an evidence-based approach to governance matters in schools/academies

Improves decision quality

- Governance is about setting strategy, holding leaders to account, and ensuring resources are used well. Using data (attainment, progress, attendance, financial metrics, staffing trends, pupil surveys) ensures decisions are grounded in reality rather than assumption or anecdote.

Aligns with statutory and regulatory expectations

- Ofsted, the DfE, Governance Guides, and the Academy Trust Handbook expect boards to base oversight on evidence. Governors and trustees are required to demonstrate that their challenge is informed, not speculative.

Supports equity and fairness

- Evidence ensures that pupil groups (SEND, disadvantaged, EAL) are not overlooked. Without it, unconscious bias or personal experience can skew decisions. Impartiality is vital.

Strengthens accountability and transparency

- Evidence provides an auditable trail for why decisions were made — useful for inspections, parents, and regulators.

Drives school improvement

- Continuous use of robust evidence (e.g., curriculum impact measures, teacher workload surveys, financial benchmarking) allows governors to spot trends, intervene early, and focus on impact rather than inputs.

Builds trustee confidence

- An evidence-led approach reduces reliance on personalities or “who shouts loudest,” making the board more strategic and less operational.

Pitfalls of not taking an evidence-based approach

Decisions based on anecdote or assumption

- Governors and trustees may rely on personal experience (“when I was at school...”), which is outdated or irrelevant.

Lack of accountability

- Without clear evidence, it is difficult to hold leaders to account or to demonstrate compliance with regulatory duties.

Increased risk

- Financial mismanagement, safeguarding blind spots, or ineffective interventions can go unnoticed if not backed up by solid evidence.

Loss of credibility

- Ofsted, RISE teams, or auditors quickly spot boards that cannot articulate evidence for their decisions. This can lead to reputational damage or even formal intervention.

Over-operational governance

- Without evidence, trustees often fall back into “doing” rather than “governing,” micromanaging leaders rather than focusing on impact and outcomes.

Missed opportunities for improvement

- If decisions are not tested against hard data, boards may be slow to act on underperformance or to adopt innovations that could benefit pupils.

In short: evidence protects boards from blind spots, regulatory risk, and subjective decision-making. Without it, governance is weakened, credibility is lost, and children's outcomes can suffer.

Indicators of an Effective and Successful Governing Board

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,
- 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,
- Understand the requirements of being a church school if applicable,
- 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.

Meeting Preparation Checklist – for clerks

Before the Meeting	Completed	By
(At least 2 weeks before) Draft the agenda and send to the CEO/principal and chair for comment		
(At least 7 days before) Upload agreed agenda to Governor Hub meeting folder and convene meeting. Use Governor Hub noticeboard and add meeting link if the meeting is virtual.		
(For a virtual/hybrid meeting) Schedule a virtual meeting and include the link in the convening message		
Make sure meeting papers are uploaded to Governor Hub and are numbered to match agenda.		
Send meeting reminder 48 hours before the meeting to confirm apologies/attendance		
At the Meeting		
Take the minutes (keep the draft)		
Have an up-to-date list of all members of the LGB/Trust Board		
Note attendance		
Make sure the meeting is quorate		
Record in the minutes the time at which any governors /trustee leaves or arrives during the meeting		
Make sure the chair seeks acceptance of apologies and any declarations.		
Capture requested agenda items for the next meeting or items for action		
After the Meeting		
(Within 1 week of meeting) Draft minutes and send to chair and headteacher/CEO for checking. Suggest a response date after which you will assume the minutes are acceptable.		
Upload the agreed minutes to Governor Hub and message LGB/Board to tell them this has been done (with link to folder)		
Keep a record of meeting attendance		
Upload a final version of the previous minutes to the signed minutes folder and email chair to ask them to mark as signed (with link to where they are saved)		
Report any changes to the membership/roles as necessary		

Digital and Data Governance

The following briefing note has kindly been provided by a colleague.

Digital and data governance is no longer a technical afterthought. It sits alongside finance, safeguarding and curriculum as a board-level responsibility. The question is not whether a school or trust uses technology — every organisation does — but whether that technology is safe, compliant and genuinely enabling.

Technology touches almost everything. A data breach can be as damaging as a financial fraud. A failed backup can disrupt learning as quickly as a heating breakdown. And poor filtering or monitoring can place children at risk just as surely as inadequate recruitment checks. This is why the statutory guidance Keeping Children Safe in Education (KCSIE) makes governors explicitly responsible for assuring themselves that digital safeguarding is in place.

The Department for Education's Digital and Technology Standards are an excellent benchmark. They spell out the basics: secure logins, reliable networks, tested backups. Every board should be confident they are being met. But they are, by design, a low benchmark. They describe the minimum that every school in the country should achieve. A board that wants technology to be more than adequate — that wants it to be empowering, efficient and transformative — will need to look further.

This does not mean governors must become IT experts. It does mean they should ask the right questions, expect clear reports, and ensure digital risks sit alongside other risks in the register. Some boards are fortunate to have a governor with strong digital knowledge. Many do not. For smaller schools or trusts, that gap can feel daunting. In those cases, it is sensible — and often cost-effective — to secure professional advice on retainer. The right adviser can give a board the digital confidence to make decisions without guesswork, bridging the gap between technical detail and strategic leadership.

Digital Governance in Practice

Governing boards don't need to know every technical detail — but they do need to know what to ask, and where to look for reliable guidance. A few well-chosen questions can open up the right conversations with leaders and IT staff, and help boards understand whether technology is safe, legal and purposeful.

Questions to ask as a governor

1. Are we confident that our backups are tested and would actually work in a crisis?
2. How do we know we are compliant with UK GDPR, and when was this last reviewed?
3. What evidence do we have that our filtering and monitoring systems are effective and meet KCSIE expectations?
4. Where do we currently meet the DfE's technology standards, and where are the gaps?
5. What risks linked to technology are on our risk register, and how are they being managed?
6. How does our digital strategy — however modest — support teaching, learning and efficiency?
7. These questions don't require technical expertise, but they do require persistence. A short, plain-English report to the board each term is often the best way to keep them live.

Further reading and resources

- Keeping Children Safe in Education (KCSIE) – <https://www.gov.uk/government/publications/keeping-children-safe-in-education--2>
- Meeting Digital and Technology Standards in Schools and Colleges – <https://www.gov.uk/government/publications/meeting-digital-and-technology-standards-in-schools-and-colleges>
- Data Protection: A Toolkit for Schools – <https://ico.org.uk/for-organisations/education/>
- Cyber Essentials – <https://www.ncsc.gov.uk/cyberessentials/overview>

- Digital Confidence Blog – <https://digitalconfidence.education/blog>

Conclusion

Digital and data governance does not need to overwhelm a governing board. It comes down to asking the right questions, insisting on clear reporting, and making sure responsibilities are clear. Where boards have gaps in their own knowledge — and most will — it is entirely reasonable to look for outside help. For smaller schools and trusts, having a professional adviser on retainer can be the simplest way to gain the digital confidence needed to provide effective oversight. What matters is not that governors know all the answers, but that they are confident enough to ask the questions and act on the responses.

About the Author

Neil Limbrick is a partner at Limbrick Consultancy LLP and founder of The Education Collective. He created the Digital Confidence service to help schools and trusts strengthen their approach to digital and data governance. Neil has been closely involved in shaping national guidance, including the Department for Education's Technology Standards, and has worked with schools, multi-academy trusts and education bodies across the UK.

He is well known for making complex digital issues understandable for non-technical audiences, particularly governors and senior leaders. Through Digital Confidence (<https://digitalconfidence.education>), Neil provides resources, advice and practical support to give boards the confidence they need to oversee technology effectively.

Stakeholder Mapping

These questions were generated using AI. What questions could you pose on AI about stakeholder?

Questions about Stakeholder Understanding

1. Who are our stakeholders, and have we captured everyone relevant to the trust? How do we find out who they are?
2. How do we accurately assess each stakeholder's level of interest and level of influence? Why does it matter?
3. Are there stakeholders whose influence or interest might change over time (e.g., new local authority representatives, incoming Ofsted inspectors)?

Questions about Engagement Strategy

4. How should we manage relationships with high-interest, high-influence stakeholders?
5. Which stakeholders require regular communication versus periodic updates?
6. How do we balance conflicting interests between stakeholders?
7. Are there stakeholders we need to empower or educate to increase their understanding and collaboration?

Questions about Risk Implications

8. Which stakeholders could significantly affect our appetite for risk in areas such as finance, growth, or curriculum?
9. Are there stakeholders whose dissatisfaction could materially impact our operations ?
10. Are there low-interest stakeholders who might suddenly become influential due to external changes?

Questions about Strategic Priorities

11. Does the distribution of stakeholders suggest areas where we are **over- or under-communicating**?
12. Are there gaps where we need to **increase influence or engagement** to support strategic goals?
13. How can we **align stakeholder management** with our trust's values, vision, and risk appetite?

Questions about surveys

14. How can we survey pupils, staff and parents/carers to capture their experiences and voice?
15. How does governance ensure that stakeholder feedback is incorporated into trust decisions?
16. Have we got a clear communication plan?

The A-Z List

A is for

- Accountability
- Accountable Officer (academies only)
- Acronym and Abbreviation
- Action and Action Log
- Admissions.
- Agenda
- AGM
- Apologies (see also N is for No Show)
- And
- Articles of Association (AoA)
- AI
- Asset
- Associate Members (maintained schools)
- Attendance
- Audit
- Autonomy

B is for

- Belonging
- Benchmarking
- Blog
- Board
- Bucket
- Budget

C is for

- Careers
- CEO (academy trusts only)
- Chair
- Chair's Action
- Chair's Power to Act
- Clerk
- Code of Conduct
- Cohort
- Collaboration
- Committee
- Communication
- Competent
- Complaint
- Compliance
- Confidentiality
- Conflicts and Declarations of Interest
- Co-opted (both academies and maintained schools)
- Covid-19
- Climate Change
- Critical Success Factor
- Culture
- Cultural Capital
- Curious

- Cyber Security and digital standards

D is for

- Data
- Deadline
- Decision
- De Facto Trustee
- Delegate
- Delegated Powers
- Disaster Recovery Plan
- Distributed Leadership
- Diversity
- Due Diligence

E is for

- Early Help
- Effectiveness
- Estates
- Ethical Leadership
- Ethos, Vision and Values
- Equality
- Exclusion – now referred to as school suspensions and permanent exclusions
- External Review
- Evidence
- Extra-Curricular and Enrichment
- E is also for everyone, expectations, enjoyment and all points in between...

F is for

- Federation
- Feedback
- Finance
- Foundation Governor
- Further Education

G is for

- GDPR
- Get Information About Schools (GIAS)
- Groupthink
- Going Concern
- Governor

H is for

- Headteacher
- Headteacher's Report
- Happy
- HR (Human Resources)

I is for

- IEB

- Implementation
- Information Governance
- Induction
- Innovate
- Instrument of Government

J is for

- Just

K is for

- KCSiE
- Key Stage
- Key Line of Inquiry
- Knowing Your School
- Key Performance Indicator

L is for

- Leadership
- Link Governor

M is for

- Master Funding Agreement
- Members (see also AGM).
- Meetings
- Minutes
- Multi-Academy Trust

N is for

- National
- Networking
- No-show

O is for

- Obvious
- Off Rolling
- Ofsted
- Outlier
- Oversight

P is for

- Pecuniary and Business Interests
- Performance Management and Appraisal
- Period Poverty
- Persistent Absence
- Policy
- Professional Prevent
- Primary
- Pupil Voice
- Pupil Premium
- Purpose

Q is for

- Questions

- Quorum
- **R is for**
- Relationships
- Records Management
- References
- Related Party Transactions
- RISE
- Remuneration
- Research
- Risk

S is for

- Safeguarding
- School Business Manager/School Business Leader/Bursar
- School Council
- School Financial Value Standard
- Scrutiny
- Single Central Record
- Stakeholders
- Skills and Knowledge Audits
- Social Media
- Spelling Mistakes
- Special Schools
- Staffing
- Standing Item
- Standing Orders
- Strategic
- System Leadership

T is for

- Training and CPD
- Trustee
- Types of Governor
- Type of School

U is for

- Understanding
- Unilateral
- Unusual
- Update

V is for

- Value(s)

W is for

- Website
- Wellbeing
- Whistleblowing
- Workload

X is for No Excuses

Y is for You

Z is for

