Governor Information Pack - 2026 -2027

Maintained Schools

Governor Services

August 2026

Lincolnshire
COUNTY COUNCIL

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Welcome

We would like to thank you for becoming a school governor and welcome you to your new role in one of the largest volunteering sectors in the UK.

This information pack has been collated to provide information and resources that will be useful to you as you embark on your governance journey.

Whilst the COVID-19 pandemic may feel like a chapter that has largely closed, its effects on education remain evident, with schools continuing to address the long-term impact on learning, attendance, and pupil wellbeing. This is coupled with ongoing national and international events which continue to have ramifications on the education sector.

The Labour Government have made commitments to the education sector through the Children's Wellbeing and Schools Bill. Governance priorities are continually evolving to address the issues that are presenting themselves. This ever-changing landscape requires the effective learning engagement of children and young people to ensure future life success.

Aspirational and inspirational teaching and effective school leadership will always remain a characteristic of the best schools but the complexities surrounding what our local, national and global communities need, and what schools can reasonably be expected to deliver well, must be continually examined, tested and evaluated against this context of constant change.

The shared aims and values that a school community lives by are crucial to its success. School governance at its best seeks to uphold these values (whilst keeping them under review) and ensures strategically that each pupil receives the best education that can be provided within a framework of support and challenge. At the heart of this role is the sustained development of positive relationships between members of the governing body, the school, and its community.

Every governor brings their own unique skills and experiences which can be used to help the governing body become and remain effective in its role. What all governors have in common is the desire to share in making a positive difference to young people through their commitment to the school and its continuous improvement.

We look forward to working with you during your term of office.

Becoming a Governor

What will I be expected to do?

On appointment as a Governor:

- Complete the required forms (Eligibility to Serve, Register of Pecuniary Interests)
- Complete the required checks (DBS & S128) within 21 days of appointment
- Read the information supplied in the Governor Information Pack sent by Governor Support
- Read information relating to the school and the governing body supplied by the clerk to governors which forms part of governor induction.
- Undertake Safeguarding Training on Induction by completing signposted Safeguarding training. Online safeguarding training is available to all Maintained School Governing Bodies for free via NGA Learning Links platform (registration details available via Governance Training Offer).
- Attend full governing body meetings and any committee meetings of which I am a member.

Before my first meeting:

- Read through the Agenda, minutes of the previous meeting and any supporting papers supplied by the clerk to governors (at least 7 clear days before the meeting) and make a note of any queries I have
- Consider what personal skills I can give to the governing body and be prepared to serve on one of its committees.

At the meeting:

- Sign up to the governing body's code of conduct/code of practice
- Contribute to discussion and ask any questions through the chair
- Ask for clarification on any points I do not understand.

During my office as a governor:

- Abide by the governing body's code of conduct and observe the rules of confidentiality
- Become a member of one of the committees of the governing body
- Commit to ongoing statutory and non-statutory training
- Keep up to date with current educational thinking
- Liaise with other Governors, the clerk to governors and the headteacher
- Remember that the governing body is **corporate,** and no single Governor can act independently unless given delegated powers to do so
- Get to know the school, take an interest in school activities, and carry out school visits
- Promote the school within the local community
- Undertake appropriate training and appropriate effectiveness and evaluation tasks.

What can I expect from the Governing Body/School?

- To be introduced to the other members of the governing body
- To be provided with an induction
- To receive the information necessary in good time for me to carry out my duties and make informed decisions
- To be kept up to date on school issues by the Headteacher and staff
- To be given the opportunity to attend governor training
- To have my views heard and treated fairly

Composition of the Governing Body

Who makes up the governing body?

- The governing body of any school is made up of volunteers who are elected/appointed in line with the Instrument of Government.
- These volunteers are drawn from parents of pupils at the school, staff, a governor nominated by the Local Authority, and members of the local community and/or who are linked with the school's foundation and/or partnership.

What is "stakeholder governance"?

- The policy of drawing governors from different groups who represent a range of interests and viewpoints is known as "stakeholder governance".
- Each has an interest in how well the school does from their own perspective.
- Collectively they embody a range of viewpoints and potentially they ensure the best outcomes for the pupils.
- Governors come from all walks of life where common sense and general life experience is valued alongside professional expertise and specialist skills.

What public documents relate to my Governing Body?

All Maintained Schools have an Instrument of Government. The Instrument of Government sets out both the name of the school and the constitution of the governing body. A copy is emailed to you by Governor Services when we are made aware of your appointment to the Governing Body.

What other DfE resources are available to me to help me understand school governance?

1. **Maintained schools governance guide - Guidance - GOV.UK (www.gov.uk)**
2. **The School Governance (Constitution) (England) Regulations 2012**
3. **The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013**
4. **Constitution of governing bodies of maintained schools**
5. **School governance update**
6. **Keeping children safe in education - GOV.UK**

Organisation of the Governing Body

How many governing body meetings are held each year?

- Meetings of the full governing body **must** be held at least three times a year.
- Many governing bodies meet more frequently.
- Three members of the governing body can request (in writing to the Clerk to Governors) an additional meeting at any time. Following such a request a meeting must be called.
- Extraordinary meetings may also be called if there is a matter of urgency that cannot wait until the next scheduled meeting, but this is the exception rather than the rule.

Can the governing body delegate some of its functions?

- The governing body can delegate many of its responsibilities to an individual Governor, a committee or the headteacher
- Governing bodies may choose different governance structures, including committee-based or committee-less models, provided that they can demonstrate effective oversight, accountability and decision making.
  NB: If the school has ratified the LCC Pay Policy, it must have a delegated Pay Committee
- Typically, a larger school would govern with committees, with responsibilities being divided as follows:
  - Finance/Resources/Premises/Staffing Committee(s)
  - Curriculum, Standards and Wellbeing Committee(s)
  - Strategic Development Planning Committee
  - Pay Committee
- Each committee consists of Governors who share their legal responsibilities to see that the school is led well, supported, and challenged appropriately and is accountable to parents and the wider community for the education that pupils at the school receive.

How are Committees organised?

- Committees are normally reconstituted at the start of each school year. This is an opportunity for the membership to be renewed or changed and the terms of reference to be reviewed
- Each committee must have clear terms of reference as responsibilities are likely to have been delegated to the committee by the governing body
- These committees report back to the full governing body, so that all Governors are aware of the work that has been done and are thus better placed to make informed decisions about strategic matters
- At least three governors are required, and one must be named as the Chair, before a committee is considered ‘quorate’ (legally able to make decisions).

Do governors have individual responsibilities?

- Governors are expected to come to each meeting well prepared to take an active part in the meeting etc
- Some Governors will hold responsibilities for specific areas, with governors also assigned responsibilities for monitoring areas of the school development/improvement plan.
- Governors should undertake regularly training and development to maintain the knowledge and skills required to fulfil their role effectively.
- All governing bodies must elect a Chair and Vice Chair of Governors.

The Chair is expected to:

- Give a clear lead in organising the governing body's work
- Delegate roles and ensure other Governors are fully involved
- Manage meetings effectively
- Hold regular meetings with the Headteacher
- Keep other governors fully informed
- Co-operate with other agencies to support school improvement.

A Vice Chair is expected to:

- Act in the absence of the Chair
- Act as a sounding board for the chair
- Share tasks with the chair when agreed, to ensure manageable workloads
- Can be allocated responsibility for induction of new governors and board training and development.

Other Governor Roles:

- Many governing bodies also appoint other Governors to hold an oversight for aspects of the school's work, such as School Food, Special Educational Needs, Safeguarding, Finance, Attendance and Wellbeing.
- Other governor monitoring roles will be assigned usually in line with priorities from the School Development/Improvement Plan.

What are working parties?

- A Working Party can be formed by a governing body to look at a particular aspect of the governing body's work. For example: if a policy is to undergo major review (or if is decided that a group of policies subject to yearly review are to be reviewed), if a particular project requires specific research to ensure its success or if a new piece of legislation poses potential implications for the school.

- A working party will make recommendations to the governing body but has no authority to take decisions.

Key Partners

Who are the key partners to support our work?

- Key people who are important to the smooth running of the governing body include the Clerk to Governors, School Business Manager, the Headteacher and staff at the school.
- For maintained schools, the local authority is also a key partner in supporting and challenging the work of the school and each maintained school is allocated a Local Authority Education Locality Lead.
- The Diocesan Board of Education (DBE) are also responsible for the appointment of governors in Voluntary Controlled and Voluntary Aided schools and provide an education advisor and training.
- The L.E.A.D. Teaching School Hub is a key partner with The Diocese, Local Authority and Partnership of Schools and provides professional development for school staff.

What does the Clerk do?

All governing boards must appoint a Clerk to Governors in accordance with governance regulations. The Clerk/Governance Professional plays a vital role in supporting the effectiveness, efficiency and compliance of the governing board.
NB: The terms **Clerk** and **Governance Professional** are often used interchangeably.

- Clerks/Governance Professionals provide independent administrative, procedural and advisory support to the governing board, helping governors carry out their responsibilities confidently and in line with legal and regulatory requirements. They are key contributors to effective governance and help promote a culture of accountability, transparency and continuous improvement. [gov.uk]
- The Clerk/Governance Professional's responsibilities typically include:
  - Organising governing board and committee meetings.
  - Preparing agendas in consultation with the Chair and Headteacher.
  - Attending meetings and producing accurate minutes and records of decisions.
  - Maintaining statutory governance records, including registers of interests and governance information.
  - Advising governors on governance procedures, constitutional matters, legislation and good practice.
  - Supporting the induction, training and ongoing development of governors.
  - Assisting the board in reviewing its effectiveness and ensuring governance processes remain robust and compliant.
  - Helping to ensure that agreed actions and decisions are recorded, monitored and followed up.

- A key responsibility of the Clerk/Governance Professional is to maintain accurate, timely and impartial records of the work of the governing board. Through agendas, minutes and correspondence, they provide documentary evidence of how the board:
  - Provides strategic leadership and direction.
  - Holds school leaders to account for educational performance.

- Oversees financial performance and the effective use of resources.
- Meets its statutory and regulatory responsibilities.

- Effective Clerks/Governance Professionals undertake regular professional development to ensure their knowledge remains current and that they continue to provide high-quality support and advice to the board.

Governors should view the Clerk/Governance Professional as their principal source of advice on governance procedures, board business and regulatory requirements.

How does the Headteacher work with the governing body?

- The Headteacher is responsible for the day-to-day leadership and management of the school and works closely with senior colleagues and middle leaders to formulate policy, establish plans, set targets and monitor practice – all of which may be discussed and approved by the governing body.
- The Headteacher provides a Headteacher report for governors outlining an overview of the progress the school is making against agreed priorities, as well as arranging for other relevant reports to be made available at different times of the year, including financial reports to monitor income and expenditure against the planned budget, benchmarking comparisons and performance data trends, Analyse School Performance (comparative performance data), and Ofsted and post-inspection reports.
- The Headteacher also provides the governing body with advice on strategic matters and ensures that documentation reflects the governing body's strategic direction.
- The Headteacher usually has a close professional relationship with the Chair of Governors, and they meet on a regular basis to ensure continuity of information.

How do other staff work with the governing body?

- Other senior staff hold leadership responsibilities. Examples might include Deputy or Assistant headteacher, Designated Safeguarding Lead, Key Stage Leader or Head of Department. These will report back to governors on aspects of their work.
- Increasingly, the school business manager (SBM) or bursar reports to a committee in respect of income and expenditure.
- Middle leaders also work closely with governors engaged in monitoring the work of the school.

Key Roles

What are the key roles of the governing body?

The Department for Education identifies three core functions of governance:

- 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

These core functions underpin all aspects of the governing board's work and are reflected throughout this information pack.

In carrying out these responsibilities effectively, governing boards focus on three key areas:

- **Strategic Leadership**

Setting the school's vision, values and strategic priorities, ensuring that decisions are focused on improving outcomes for pupils, managing strategic risk and securing the long-term sustainability of the school.

- **Constructive Challenge and Support**

Providing appropriate support to school leaders while asking informed and challenging questions, using evidence to test assumptions, monitor progress and drive continuous improvement.

- **Accountability**

Holding school leaders to account for educational performance, safeguarding, financial management and compliance with statutory responsibilities, whilst ensuring that decisions are transparent and in the best interests of pupils.

Although each area has its own characteristics, they are closely connected and together form the basis of effective governance. Effective governing boards maintain an appropriate balance between strategic leadership, constructive challenge and accountability to support the ongoing success of the school.

Can you explain these three roles and how I might be involved in them?

Strategic Leadership is concerned with decision-making around the values, aims and aspirations of the school. It takes account of where the school is now, where it wants to be in the future and how it will get there. As a Governor you should know what the aims and values of your school are and use this knowledge to support you in making decisions about the school. The governing body is responsible for setting the policy framework within which the school manages the day to day running.

Good strategic leadership is often characterised by clearly articulated and shared values, vision and aims. The governing body provides clear strategic direction supported by the

school's Headteacher and staff. The school community is clear about what is important to the school and the future direction of the school.

Constructive Challenge and Support is the way in which the governing body acts as a critical friend of the school. 'Critical' in the sense of its responsibility for monitoring and evaluating the school's effectiveness, asking challenging questions and pressing for improvement. A 'friend' in the sense that governors celebrate the successes of the school and promote its interests.

Good support and challenge rests on the confidence to ask questions, the quality and timing of information provided, the ability to understand reports received and the desire to play an active part in the life of the school.

As a Governor you will want to know from the school; how well pupils are achieving in their academic work and extra-curricular activities, how good pupils' attendance is and what strategies are being deployed to overcome barriers to attendance, whether any pupils have been excluded (and why). You will want to know how well pupils behave and whether their attitudes to learning help them to do their best. You will want to understand whether pupils feel safe, and free from bullying and to what extent parents are involved in their child's learning.

Accountability is concerned with the school's performance across a range of indicators and at different times of the year. Headteachers are accountable to the governing body for the attainment and progress of every pupil in the school, the curriculum they receive and the leadership and management decisions that help this to happen.

Good accountability is evident when quality documentation is presented in an accessible way to the school and wider community. The governing body explains its decisions and welcomes comment and questions from the school community. As a Governor you should always be prepared to engage with school stakeholders and others to explain decisions taken by the governing body, remembering that these are corporate decisions.

Key Documents

What school resources will be useful to me to fulfil these roles?

The School Website will contain relevant statutory and useful information.

The School Self Evaluation (SEF) captures the school's strengths and weaknesses. It is used to summarise the school's position and is used particularly at the time of a school inspection by Ofsted.

The School Development Plan (SDP) (also known as the **School Improvement Plan (SIP)**) identifies the school's priorities and targets in both the long- and short-term following communication and consultation with a range of 'stakeholders' that may include governors, staff, pupils, parents, and members of the local and wider community. It is a public document primarily used within the school for planning and action purposes.

The Ofsted Inspection Report provides a public summary of the latest school inspection report for the school and can be found on the Ofsted website.

The Analyse School Performance report from the Department for Education (DfE) provides an annual performance report for the school and is a confidential document for internal school use (which is also available to the Local Authority and Ofsted). It contains measures of the schools' attainment performance and value-added progress compared with other schools.

The Headteacher's Report to governors is written prior to each full governing body meeting and provides an up-to-date summary of school information, progress against priorities and the quality of teaching and leadership and management within the school.

Governor Visit Reports are written following a focused visit into school by a Governor(s). Often these reports are written to an agreed pro forma and will highlight any issues arising from that visit.

Financial Reports can be produced each month by the school to monitor actual school expenditure against planned expenditure. These are normally used by the governing body to ensure that spending is on track and to vire money from one allocation to another during the financial year.

An Auditor's Report will be written following an audit visit. Within the report any financial issues will be raised, and the urgency with which these issues should be addressed indicated.

The Risk Register provides the governing body with an overview and mitigation schedule for the management of risk. Governors are expected to understand their school's risk appetite, ensure that a risk register is maintained and reviewed regularly, and confirm that appropriate controls and mitigation strategies are in place. Risks may be internal (eg staffing, compliance, financial) or external (funding changes, policy shifts, environmental events). Governance-specific risks – such as governing body capacity and skills gaps must also be considered.

Governors should receive regular assurance that significant risks are being effectively managed and that mitigation actions remain proportionate and effective.

Information governance reports provide assurance that the school is meeting its responsibilities relating to data protection, records management, cyber security and information sharing. Governors should seek assurance that appropriate data protection arrangements are in place, staff receive suitable training, cyber risks are identified and managed, and any significant data breaches or incidents are reported and addressed appropriately.

Main Responsibilities

Governing Bodies are encouraged to adopt an **annual planning cycle** to structure their work across the academic year. This approach ensures that statutory duties, strategic priorities, and monitoring responsibilities are addressed in a timely and coherent manner and allows the Governing Body to undertake effective governance by meeting the three core functions of governance.

Using an annual cycle helps governing boards remain focused, proactive, and responsive to the needs of the school community.

How are the key roles converted into the main responsibilities?

It is up to each governing body to determine how best to meet their roles and responsibilities. There is no blueprint for governance, but it is often the case that the whole governing body will delegate certain responsibilities, for example to committees (see Organisation of the Governing Body).

What are the key responsibilities?

There are a number of key responsibilities including:

- ***pupil achievement***
- ***financial management***
- ***staffing***
- ***safeguarding and welfare***
- ***risk management, information governance and statutory compliance***

*What exactly are governors responsible for in **pupil achievement**?*

- The governing body establishes an ethos of high expectations and aspirations for all.
- The governing body may delegate a detailed scrutiny of pupil standards and progress to a committee or to a monitoring governor(s).
- This committee/governor(s) would compare the pupils' results against other schools and against national benchmarks to identify how well the school is achieving and to challenge any underperformance of cohorts and groups each year and over time.
- It/they also need to identify whether pupils are making expected progress, and where pupils fall behind, what action the school is taking to support those pupils and whether that remedial action is successful.

*What exactly are governors responsible for in respect of **financial management**?*

- Management of the school's delegated budget is the overall responsibility of the governing body although they can delegate authority for certain tasks, for example to the finance committee or finance governor, headteacher or other staff, provided this is agreed and recorded, at least annually, in the minutes of the Governing Body meetings.
- The Governing Body **must** receive 6 finance reports per year to meet Schools Financial Value Standards.

- The committee/finance governor will undertake a regular review of the school's finances.
- In Lincolnshire, financial governance is guided by the Scheme For Financing Schools September 2025 , which sets out the financial relationship between maintained schools and the Local Authority
- Governors should also reference the School Finance Handbook which contains the Roles and Responsibilities of the Governing Body in Section A3.

*What exactly are governors responsible for regarding **staffing**?*

- Staffing issues again normally fall under the overall responsibility of the governing body, however a HR/Staffing committee will often deal with detailed matters.
- Whilst recruitment and appointment of new staff is the responsibility of the headteacher, the total number of staff employed remains the governing body's responsibility.
- Leadership appointments (Headteacher including Deputy Headteacher) are the responsibility of the governing body which appoints an appointments panel to carry out the process.
  NB: At least one governing body member must hold a safer recruitment certificate.
- Similarly, a small group of appointed governors carry out the performance management of the headteacher each year with a governing body appointed external advisor, and referencing the Headteacher Standards.
- The Pay Committee have delegated responsibilities regarding Pay.
- Further committees will need to be constituted to deal with other HR issues.
- Retention of good staff and leadership planning is also an important part of this remit.

School Terminology

What is the School Improvement cycle?

The school improvement cycle is a feature of ongoing change management in all schools. It involves processes such as:

- ***evaluation*** – making a judgement about how high standards are, taking account of how the school compares with its own recent performance, with that of other similar schools and nationally, and whether the actions are having the impact needed or whether alternative approaches are required
- ***planning*** – identifying the school's priorities and targets and organising and targeting the resources available so that the school's priorities can be met
- ***action*** – doing what needs to be done to achieve the school's goals
- ***monitoring*** – finding out if the planned actions have taken place and to what extent they have had a positive impact.

What is School Self Evaluation?

- Self-evaluation is a crucial part of the schools ongoing cycle of review and improvement planning. A self-evaluation summary is an important tool which enables a school to draw together an evaluation of different aspects of their work leading to an evaluation of the quality of education provided by the school overall.
- There is no fixed time in the year when a self-evaluation might be completed.
- School self-evaluation is the systematic review of all aspects of the school, which culminates in an agreed judgement about the school's current performance (in terms of achievement, provision and leadership and management) and records its priorities and targets for future development.
- OFSTED will request to see a summary of any self-evaluation or equivalent.
- A governing body that is confident, knows its school well and knows where it is heading can significantly strengthen the overall leadership and management of the school.

What is School Development/Improvement Planning?

- This is the name given to the process following school self-evaluation. When a school professionally judges how well it is doing, the next step is to plan for prioritised improvements to take place.
- Although it is likely that all aspects of the school's work will be considered in drawing up the school priorities for improvement, it is helpful if the agreed school development plan focuses on the few areas that will have the most impact for pupils.
- The school development plan comes in many formats, but it is essentially a collaborative document, which sets out to improve the work of the school at a pace appropriate to the school's context.
- Normally it will outline the priorities and targets over one to three years and include a detailed plan over the coming year. Governors will look to the headteacher and senior

staff to provide information about the progress of the priorities within the school development plan over the course of the year.

- The detailed Action Plan might be typically broken down into a number of targets/priorities, time-limited actions and ‘milestones’ to ensure the agreed criteria for overall success are eventually met.
- Responsibilities of key staff and other personnel would be highlighted (including involvement by governors or the local authority, for example in monitoring or providing professional development), and anything with a cost implication would be linked to the school’s budget.

What is teaching and learning?

- No one will argue that the quality of **Teaching and Learning** affects outcomes for pupils. This includes not only the standards pupils reach but also their motivation to continue learning new skills and knowledge so their potential for better life choices is increased.
- The same cyclical processes for improving the school also generally apply to more specific areas such as teaching and learning, through the examination of such aspects as curriculum content, subject expertise, methods of lesson delivery or rates of progress. It is through thoughtful evaluation, planning, communication, undertaking action, monitoring and re-evaluation that positive change will be affected.
- Governors provide useful support and challenge through questions asked informally as well as through taking part in planned monitoring activities, for example, through SDP priority review, specified governor role or considering the learning experience from the child's point of view.

What is "Special Educational Needs and Disabilities"?

- The achievement and wellbeing of every child in the school is fundamental to its core work.
- Pupils who have **Special Educational Needs and Disabilities (SEND)** can present a wide range of challenges which require the knowledge, expertise and skills of any number of specialist staff who visit the school on a part-time basis.
- The quality of communication and liaison between parents, pupils, teachers, support workers, outside agencies and others requires good organisational skills as well as knowledge of each child and their need(s).
- Leading and co-ordinating provision for pupils with SEND is the Special Educational Needs Co-ordinator (*SENCO)* who is a qualified teacher. The SENCO also arranges review meetings throughout the year with those involved to discuss the progress of each pupil and agree their 'next steps'.

- Historically, many schools have used non-statutory Individual Education Plans (IEPs) to record targets, support strategies and provision for pupils with special educational needs. Under the Government's proposed SEND reforms, these are expected to be replaced by Individual Support Plans (ISPs). Subject to the successful passage of legislation, schools are expected to have a statutory duty to use ISPs from September 2029. Until the reforms are implemented, schools should continue to follow current SEND legislation and guidance.

- Sometimes, pupils' needs can highlight professional development issues for staff, for example identifying the best ways to engage a pupil who is hard of hearing or developing a whole school approach for one particular pupil, who for example exhibits regular challenging behaviour which disrupts lessons.

- Governors **must** review the SEND policy in light of the *SEND Code of Practice 2015*, and disabled access arrangements, on an **annua**l basis. A SEND governor can ensure, through good communication with the SENCO and through participation in

collaborative monitoring and evaluation, that school improvement extends to this very important area of provision.

Strategic Leadership

What is Strategic Leadership?

- Strategic leadership is closely allied to the strategic direction of the school which involves setting aims, agreeing policies, plans and targets that reflect those aims and monitoring and evaluating the impact of the actions.
- School's arrangements for review should be manageable and complement a school improvement/development workload that is organised, shared, and spread over the year.
- The governing body's remit for responsibility can be daunting:
  - Planning for spending the school's budget allocation
  - Taking decisions about staffing arrangements, pay and performance management
  - Making sure the curriculum is 'broad and balanced' and includes Religious Education and collective worship
  - Taking a strategic and rational approach to promoting high standards of achievement; ensuring standards of behaviour, discipline and wellbeing promote learning
  - Maintaining policies such as admissions, discipline, safeguarding, child protection, SEND, exclusions and appeals (in some schools)
  - Appointing the next Headteacher and carrying out other statutory obligations relating to premises, insurance, health and safety, organisation of the school and information to parents will all be affected by the quality of leadership.
  - Ensuring that appropriate risk management is undertaken.
  - Providing strategic oversight of information governance, data protection, GDPR compliance, cyber security and digital resilience, ensuring that information is managed securely, legal obligations are met, and digital risks are effectively identified, monitored and mitigated.
- When leadership is strategic, many of the areas that governors are collectively responsible for can be affected and strengthened by a single priority for development.
- Key to strategic leadership is the Governing Body's annual self-evaluation exercise where governors can reflect on their leadership, culture, structure and impact. (See Appendix B for NGA self-evaluation tool).

What is Leadership Planning?

- There are many reasons why developing future leaders from within the school's staff and planning for future leadership makes sense in the wider context of governors' strategic planning.
- Recruiting and retaining Headteachers has become increasingly challenging in recent years – and Governing Boards should consider succession planning as a matter of course.
- When considering its key role in staffing, governors have a vital role to play in to ensure the school is equipped with the staff it needs to carry out its vision for continuous improvement.

What are Academies and Free Schools?

The Department for Education states that **Academies Free schools** are run by not-for-profit academy trusts and are independent from the Local Authority - **Types of School: Academies**. The Labour Government are progressing their Children's Wellbeing and Schools Bill through Parliament currently.

Support and Challenge

*How do governors **Support and Challenge** the school?*

- This is one of the three key roles of the governing body.
- Asking what sometimes may be difficult, probing, questions and discussing what and how the school might need to improve, governance of the school has much potential to shape the quality of education at the school.
- New Governors may or may not know, a great deal about the school. Either way, to be effective in this role, it is helpful to understand the school's history as well as to keep abreast of current developments and trends.
- Information acquired through the Headteacher's report to governors each term and participating in agreed visits to the school (with reference to the school's policy on governor visits) should assist new (and more experienced) Governors in their endeavours.

*What is the **Headteacher's Report to Governors?***

- The governing board determines the scope, content and frequency of the report.
- This should be kept under review to ensure that the information requested is useful and effective.
- Boards should remain mindful of workload implications for school leaders and staff.
- The report supports the three core functions of governance by raising issues on which strategic decisions need to be taken, accounting to the governing body for the school's performance, and includes statutory reporting information. Where appropriate, the report may also include updates relating to safeguarding, attendance, behaviour, financial performance, risk management, information governance and cyber security.
- The Headteacher's report is circulated to every member of the governing body, together with the agenda for the coming full meeting and the minutes of the previous one, legally a minimum of 7 days prior to the meeting, to ensure all governors have time to read, reflect and prepare any questions. Minutes from committees may also be included.
- During the meeting, the Headteacher will be invited to highlight the main points from the report, take questions about the detail of the report and answer questions or open the point for discussion. Decisions about matters arising may be taken during the meeting or deferred to a committee to follow up.

*Can you tell me a little more about **Governor Visits**?*

- Because every school is unique, visits into school help governors gain important insight into the life, work and ethos of the school, equipping them with first-hand experience of how pupils are learning and progressing in their development and how teachers and leaders are driving the learning process.
- Visits into school provide an insight into the work of the school and the translation of priorities into action and so not only strengthen governors' ability to support and challenge the leadership

and management of the school effectively, they can be vital in deepening Governors' individual and collective understanding of the school's policies, practices and performance for which Governors have overall responsibility.

- It is an opportunity to celebrate the hard work and successes of all those involved and to encourage further effort and commitment in the process of school improvement.

Accountability

- Governors' accountability is a two-way process.
- Most of what goes on in school is the Headteacher's responsibility.
- Staff are accountable to the Headteacher and the Headteacher is accountable to the governing body - not only for the responsibilities the governing body has delegated to the Headteacher but also for those which s/he is required by law to carry out.
- The Headteacher must report to the governing body on all of these areas as the governing body requires.
- The governing body accountable for its own actions but, ultimately, for everything that goes on at the school.
- In practice, because the Headteacher is accountable to the governing body for the school's overall performance, most Headteachers are full members of the governing body – at the very least the Headteacher is entitled to attend meetings of the governing body and its committees.

Stakeholders

What do parents expect?

- Parents can expect to be provided with information about their own child's progress as well as what they are being taught.
- The School Governance Regulations allow for Governing Body paperwork, including Committee paperwork to be requested. The Clerk to Governors can advise further on the relevant regulations.
- They are entitled to receive a range of government specified information, normally found on the school's website, as well as any non-confidential reports about the school such as the outcome of an Ofsted inspection.
- Parents should be consulted about how they view the different aspects of the education their child receives at the school, and the results of these surveys can influence the choice of priorities in the school development plan if for example an important concern which requires strategic attention is shared by many.
- For operational issues that concern one or more parents, sometimes these can be addressed quickly and easily without the need for longer term action planning.
- Parental surveys can highlight small things the school previously may not have been aware of and the effectiveness of the school's response to concerns raised by parents can go a long way to ensuring their satisfaction with the school.
- If you are approached by a stakeholder who wishes to raise a complaint, you should direct them to the school's complaint procedure, which is published on the school website. The complainant then has the right to escalate their complaint through all the stages of the relevant procedure and finally onto the DfE if they are dissatisfied.

What does Ofsted do?

- The Office for Standards in Education (Ofsted) is legally required to carry out inspections in all maintained schools under the Education Act 2005.
- Governors can review the Toolkit here:
  - School inspection toolkit
- Governance is inspected under "Leadership and Governance" within the Toolkit and there are details of what inspectors will be focussing on for governor information within this section.
- Safeguarding is always a focus for inspectors and has its own criteria within the Toolkit.
- Schools are usually informed of an inspection on a Monday morning.
- Inspectors will expect to meet members of the Governing Body.

Advice and Supporting Governance

What advice and support is there beyond the governing body?

There is plenty of advice and support offered to Governors which includes an appointment letter, copy of the Instrument of Government and this Governor Information Pack. There is also a dedicated Governor Services webpage - Governor Services – Professional resources which has links to resources and the training offer.

Governor Support is provided free by the local authority and provides a range of advice and resources to all maintained schools.

Online and Telephone Advice
E-mail and telephone support is available to answer all queries from all Governors, Headteachers and Clerk to Governors.

Contact: Governorsupport@lincolnshire.gov.uk
(request a telephone call back or access email advice)

Governor Training Courses
There is a Governance Training Offer available, which outlines all training and briefing events available over the course of the academic year - Governance Training Offer – Professional resources

Governor E-Learning
The Local Authority provides **FREE** access for all maintained school governors to the NGA Learning Link platform – registration details can be found here: NGA Learning Link – Professional resources .

This online platform has over 50 online courses which are designed to develop skills and provide information on key areas to ensure effective governance.

Glossary of Terms (NB: subject to change/ relevance to educational setting)

Academy /Academies are publicly funded independent schools. Academies have different governance arrangements from other schools
Academy committee A committee of the trust board in a Multi Academy Trust (MAT). The role and responsibility of any committee is defined in the MAT's scheme of delegation (see also local governing body)
Academy converter A school which converted to academy status voluntarily (usually high performing at the time of conversion), having previously been a local authority-maintained school
Academy sponsor led A school which converted to academy status with the support of a sponsor (usually lower performing at the time of conversion)
Admissions Code A document providing statutory guidance on schools' admission with which all schools must comply
AP Alternative Provision – education for children who cannot attend mainstream school for some or all of the time.
Articles of Association The Articles of Association is the formal governing document for an academy and sets out its rules for operating, including the composition of the governing board/board of trustees
ASCL Association of School and College Leaders – a headteacher union
Associate members Individuals appointed by the governing board of a maintained school. They are not part of the board but are allowed to attend meetings and sit on committees and can be given voting powers at committee level. They are appointed for 1-4 years, with the opportunity for re-appointment. An associate member could be a pupil, member of staff or someone with expertise in a particular area. Academies' Articles of Association allow them to appoint non-governors/trustees to committees and give them voting rights
ASP Analyse school performance. Access to this service is via the Department for Education's Secure Access portal, governors and trustees can be given access to view detailed performance analysis to support local school improvement
Assessment without levels A common phrase to describe changes to the primary curriculum. Grade descriptions and levels have been removed from the national curriculum, and it is up to primary schools to decide how they track pupil progress and attainment. Children take Standard Assessment Tests (SATs) in Key Stage 1 and Key Stage 2 as a national benchmark; however, they are not given a grade, but a scaled score; with a score of 100 or above showing that a pupil has met the national expectations
Attainment 8 A headline measure of school performance at GCSE introduced from 2016. Measures the achievement of a pupil across English, maths and six further qualifications
Attainment targets These establish what children of different abilities should be expected to know and be able to do by the end of each key stage of the national curriculum
AWPU Age-Weighted Pupil Unit – the sum of money allocated to the school for each pupil according to age. This is the basic unit of funding for the school
Baseline assessment Assessment of pupils' attainment on entry to reception. Baseline assessment became statutory from September 2021: schools carry out the assessment within the first 6 weeks of children starting school.
Capital funding Spending on projects, improvements and extensions to the school's land and buildings
Catch-up premium Funding to support children and young people to catch up lost time after school closure during COVID-19 pandemic.
Chair's action In maintained schools the chair is allowed to take decisions without asking the governing board if a delay will be detrimental to the school, a member of staff, a pupil or a parent. In academies, this power is not automatic and must be delegated to the chair
Charitable Objects set out within the Articles of Association in academy schools, explaining what the charity set up to run the Trust seeks to achieve Chief Executive Officer (CEO) The lead professional and head of the executive branch for a group of academies known as a multi-academy trust (MAT). Although not being a headteacher in any school, they will be ultimately accountable to the governing board/board of trustees for all aspects of the MAT as a whole
CiC Children in Care

Clerk (or Governance Professional) Professional-quality clerking is about much more than taking minutes to record the discussions and decisions of the board. It is also about providing governing boards with expert advice on governance, procedures and compliance and directly contributing to its efficient conduct. Professional clerking has a vital role to play in meeting the administrative and procedural requirements of boards and enabling efficient and effective discussion and decision making
Collaboration An agreement between two or more schools to work together on one particular issue. They keep their individual governing boards, but may set up a joint committee to which they can delegate powers
Community schools Maintained schools at which the local authority (LA) is the employer, owns the land and buildings and sets the admission criteria. The LA also take a proportion of income known as 'top slice' for the provision of central services
Community special schools Maintained schools which make special educational provision for pupils with statements of special educational needs and disabilities (SEND) or education, health and care plans (EHCs), whose needs cannot be fully met from within mainstream provision. The LA is the employer, owns the land and buildings and sets the admission criteria
Competitive tendering Obtaining quotes or tenders from alternative suppliers before awarding contracts
Co-opted governor/trustee Appointed by the governing board, on the basis of their skills
CPD Continuing Professional Development for school staff or the governing board
CPOMS - Safeguarding and Child Protection Software for Schools
DDA Disability Discrimination Act
Delegated budget Money provided to schools, which governors can manage at their discretion
Delegated powers Authority given to a committee, an individual governor/trustee or the headteacher to take action on behalf of the governing board. In multi academy trusts this also refers to powers delegated to academy local governing bodies/committees
DfE Department for Education – the government department responsible for schools and children
Directed time Time when a teacher must be available to carry out duties, including attending staff and parent meetings, under the direction of the headteacher – a maximum of 1265 hours in a school year
Disapplication A term used where national curriculum requirements may not apply to a pupil
DSG Dedicated School Grant – funding from central government to the LA, the majority of which is then delegated directly to individual schools through the LA's funding formula
EEF Education Endowment Foundation
EAL English as an Additional Language
EBacc A school performance measure based on achievement of GCSEs in 'core academic subjects' of English, maths, history or geography, the sciences and a language
EBD Emotional and Behavioural Difficulties
ECT Early Career Teacher (formerly NCT - Newly Qualified Teacher)
ESFA Education and Skills Funding Agency – a single funding agency accountable for funding education and training for children, young people and adults (formerly the EFA and SFA). The financial responsibilities of the ESFA moved to the Regions Group in 2024
EHC plans Education, health and care plans (Also EHCP) – the document which replaces statements of SEN and Learning Difficulties Assessments for children and young people with special educational needs
ESO Education Supervision Order, which LAs may apply for to deal with cases of poor attendance at school
Ethos The morals, values and beliefs that do, or at least should, underpin the school culture
EWO Education Welfare Officer – a professional worker who visits pupils' homes and deals with attendance problems and other welfare matters in co-operation with the school
Ex officio Able to hold office and attend meetings by virtue of holding a particular office
Exclusion The permanent removal of a pupil from school for serious breaches of the school's behaviour and discipline policy
Executive headteacher Unlike a traditional headteacher who leads one school only, an executive headteacher is the lead professional of more than one school; or a lead professional who manages a school with multiple phases; or who has management responsibility significantly beyond that of a single school site
Executive leaders Those held to account by the board for the performance of the organisation. This may be the CEO, executive headteacher, headteacher or principal, as well as other senior employees/staff, depending on the structure of the organisation
Extended schools/ Enrichment services Schools that provide a range of services and activities often beyond the school day, to help meet the needs of the pupils, their families and the wider community
Federation Two or more maintained schools governed by one board

FFT Fischer Family Trust – a non-profit company that provides data and analysis to LAs and schools in England and Wales
Foundation schools Maintained schools in which the governing board is the employer, owns the land and buildings and sets the admission criteria
Foundation special schools Maintained special schools, which have the same freedoms as foundation schools (see above)
EYFS Early Years Foundation Stage curriculum which sets standards for the learning, development, and care of children from birth to 5-years-old
Free school A type of academy, either a new school set up in response to parental demand or a fee-paying school joining the estate education system
FSM Free school meals – pupils are eligible for FSM if their parents receive certain benefits
Funding agreement The document which sets out the relationship between an academy/MAT and the Department for Education (DfE)
GCSE General Certificate of Secondary Education
GCSE grading GCSEs in England have a 9 to 1 grading scale, to better differentiate between the highest performing students and distinguish clearly between the old and new exams. Grade 9 is the highest grade and will be awarded to fewer students than the previous A* grade.
GDPR General Data Protection Regulation
GIAS Get Information About Schools. Government database. Schools must use GIAS to provide the required information relating to the individuals involved in governance at their setting. Maintained school governing boards are under a duty to provide this information through the Education Act 1996; the requirement for academy schools is contained within the Academy Trust Handbook. The information must be kept up to date when changes occur. It is worth noting that each school in a federation has a separate DfE number, so they appear separately on GIAS, therefore the governance information will need to be completed for each school in the federation. The information is collected and published through a secure site which is accessed via the school's username and password.
HLTA Higher Level Teaching Assistant
HMCI Her Majesty's Chief Inspector of Schools
HMI Her Majesty's Inspector
HSE Health and Safety Executive
Hub Board A governing board established to oversee a group of schools, often within a Multi-Academy Trust (MAT). The hub board is, in effect, a committee of the trust board and may have delegated responsibilities, which will be defined in the Scheme of Delegation (SoD)
IEP Individual Education Plan for pupils with special educational needs
IGCSE International GCSE
INSET In-Service Education and Training; training for teachers and other school staff. All maintained schools are required to open for 197 days, of which pupils should attend for 190 days during each academic year. Schools are allowed to set two days of occasional holiday and five staff training (INSET) days.
Instrument of Government A legal document setting out the composition of maintained school boards. The Instrument of Government can be changed through reconstitution
ISP – Individual Support Plan (proposed for under SEND reforms for school-led plan)
KPI's Key Performance Indicators. Used to evaluate the success of a school or of a particular activity in which it engages
KS 1–4 Key stages 1-4. The four stages of the national curriculum:
KS1 for pupils aged 5-7; KS2 for 7-11; KS3 for 11-14; KS4 for 14-16.
KS5 Key stage 5, this applies to 16-19 year-olds but is not part of the national curriculum
LA Local authority The LA has certain responsibilities regarding education, for example the educational achievement of looked- after children and for school places planning. The LA may also provide other services to schools, provided via a service level agreement to maintained schools and academies
LA Governor Nominated by the LA but appointed by the governing board
LAC Looked After Children. Children who are in care provision. May also refer to children who have been in care at any time in the last six years
LGB Local governing body A term often used to describe a committee of a trust board for an individual school within a MAT. The Scheme of Delegation will define if the LGB has any delegated responsibilities or is purely advisory. Accountability sits with the MAT Trust board

LGC Local governing committee A term often used to describe the governance of an individual school within a MAT. Local governing committees are, in effect, committees of the trust board; they can be delegated responsibility for items, but accountability will remain with the trust board. The Scheme of Delegation will define if the LGC has any delegated responsibilities, or is purely advisory
LACSEG Local Authority Central Spend Equivalent Grant – the funding academies receive to meet their additional responsibilities
Maintained schools publicly funded schools overseen by the local authority. These schools must follow the national curriculum
and national pay and conditions guidelines
MAT Multi academy trust – where two or more academies are governed by one trust (the members) and a board of trustees (the trustees)
MAT board Common term for the board of trustees/directors overseeing a multi academy trust
Member In an academy school the Members hold the Trust board to account. Members may be named individuals, or corporate members, such as Diocesan representation
Mixed ability A teaching group in which children of all abilities are taught together
NAGAS National Association of Governance Advisory Services
NAHT National Association of Head Teachers – a headteacher union
NASBM National Association of School Business Managers
NASUWT National Association of Schoolmasters Union of Women Teachers – a teaching union
National curriculum This was established by the 1988 Education Reform Act to ensure that all pupils receive a broad and balanced education, which is relevant to their needs.
NEU National Education Union
NFER National Foundation for Educational Research
NGA National Governance Association. A national membership organisation for school governors, trustees and clerk/governance professionals
Non-teaching (support) staff Members of the school staff employed to provide services in a school, such as teaching assistants, mealtime assistants, cleaners and office staff
NOR Number on roll; the number of pupils registered to attend the school
NPQH National Professional Qualification for Headship– training for new or aspiring headteachers
Ofqual Office of the Qualifications and Examinations Register– the regulator of examinations and qualifications
Ofsted Office for Standards in Education, Children's Services and Skills – the body which inspects education and training for learners of all ages and inspects and regulates care for children and young people
PAN Published Admissions Number – the number of children the LA (or governing board of a foundation or voluntary aided school or academy trust) determines can be admitted to any one-year group in the school
Parent governor/trustee Member of the governing board elected by the parents of the school's pupils
Peripatetic teacher One who teaches in a number of schools, to give specialist instruction, e.g., in music
PE and sports premium Funding for years 1 to 6 to provide additional PE and sport beyond that already provided in the curriculum. Boards must report on their use of the funding by publishing information on the school website
PFI Private Finance Initiative
PGCE Post-Graduate Certificate of Education
PPA Planning, Preparation and Assessment – 10% guaranteed non-contact time for teachers
Progress 8 A headline measure of school performance at GCSE introduced from 2016. It aims to capture the progress a pupil makes from the end of KS2 to the end of KS4
PRP Performance Related Pay – schools following the School Teachers' Pay and Conditions Document will decide if teachers' pay is linked to their performance. The board will delegate responsibility for performance related pay to a Performance and Pay Committee, under clear terms of reference. PRP no longer mandatory from 2024/25
PRU Pupil Referral Unit – alternative education provision for pupils unable to attend a mainstream school or special school
PSP Pastoral Support Programme for pupils at serious risk of permanent exclusion
PTA Parent Teacher Association – or PSA (Parent Staff Association) or PTFA (Parent, Teacher and Friends Association)
PTA UK National membership organisation for parent teacher associations – formerly NCPTA
PTR Pupil/Teacher Ratio – this is calculated by dividing the number of pupils in a school by the number of full-time equivalent teachers
Public Sector Equality Duty A duty to consider if and how decisions may affect people who are protected under the Equality Act 2010

Pupil premium Funding allocated to schools to support pupils eligible for FSM, in care, or who have parents in the armed forces. Boards must report on their pupil premium strategy and how the funding has been spent to improve outcomes for pupils. This information must be published on the school website
QTS Qualified Teacher Status
Quorate A meeting is quorate if a sufficient number of members are present. Decisions can only be ratified if a meeting is quorate
Quorum The minimum number of members present at a meeting before decisions can be made
Regional Directors (RDs) Civil servants that act on behalf of the Secretary of State. Their responsibilities include intervening in underperforming schools, making decisions on conversion to academy status, and encouraging and deciding on applications for academy sponsors.
Resolution A formal decision which has been proposed and agreed at a meeting
Revenue funding Revenue funding can be spent to provide services and buy items that will be used within a year. Examples include salaries, heating, lighting, services and small items of equipment
RISE Regional Improvement for Standards and Excellence – universal support to help all schools improve and targeted interventions for eligible schools
Risk Register A document analysing financial and business risks, identifying the scale of the risk and what mitigating factors have been put in place
ROA Record of Achievement
SACRE Standing Advisory Council on Religious Education– local statutory board which advises on religious education and collective worship
SATs Standard Assessment Tasks – used for national curriculum assessment
Scheme of delegation A document defining the lines of responsibility and accountability.
School census A statutory return which takes place during the autumn, spring, and summer terms. Maintained schools and academies are required to take part in the census
School Development Plan/School Improvement Plan (SDP/SIP) The operational document describing how the school will work towards the strategic priorities set by the governing board
Secondment The release of staff on a temporary basis for work elsewhere
SEMH Social, emotional and mental health
SEND Special Educational Needs and Disabilities
SENDCO SEND Co-ordinator – the teacher responsible for co-ordinating SEND provision in the school
Senior Executive Leader (SEL) – academy trusts must appoint a senior executive leader (who may be known as the principal in a single academy trust, or CEO in a MAT, or equivalent) as the accounting officer (AO) for the trust
Service level agreement (SLA) A contract between a service provider (the local authority or another private sector provider) and a school, defining the level of service expected from the service provider
SLT Senior Leadership Team
Service premium Funding allocated to schools to support pupils whose parents are serving in HM armed forces, or have at any time since 2011, or who are in recipient of a child's pension from the Ministry of Defence
SFVS Schools Financial Value Standard – a means for the governing board in a maintained school to assess its financial processes, capabilities and skills.
SIAMS Statutory Inspection of Anglican and Methodist Schools.
SIAMS has sought to provide Church schools with a tool for effective self-evaluation and a process of external review which enables continued development. The framework focuses on vision, allowing governing boards to place more emphasis on their purpose in education, ensuring that the school's Christian vision impacts in ways which enable the whole school community to flourish
SIMS Schools Information and Management System – a computer package to assist schools in managing information on pupils, staff and resources, provided by Capita
Special school for pupils with a statement of special educational needs and disabilities (SEND) or an education, health and care plan, whose needs cannot be fully met from within mainstream provision
Sponsor An organisation or person who has received approval from the DfE to support an underperforming academy or group of academies. Examples of sponsors include academies, businesses and charities
School Resource Management Self-Assessment Checklist (SRMSAC) A statutory return, providing a means for the governing board in an academy school or multi-academy trust to assess its financial processes, capabilities and skills.
Staff governor/trustee Elected by those who are paid to work t the school, from across the teaching and non-teaching staff. In some academy schools staff trustees are appointed, rather than elected, as defined in the articles

STPCD School Teachers' Pay and Conditions Document – an annually published document which forms a part of the contract of all teachers and headteachers in maintained schools in England and Wales. Many academies will also follow the STPCD

Strategic plan The school's strategic document which sets out a small number of key priorities for the school over the next 3-5 years. The governing board should take the lead on developing the strategic plan

STRB School Teachers' Review Body – makes recommendations to the Secretary of State on teachers' pay

Streaming Placing pupils in classes according to their ability across a range of subjects

TA Teaching Assistant

Teaching schools Schools that receive funding from DfE to work with other schools to provide professional and leadership development, school-led initial teacher training (ITT) and school-to-school support

Teaching school hubs Led by teaching schools and include schools that are benefiting from support as well as strategic partners

Terms of reference The scope and limitations of a committees' (or individuals') activity and delegated responsibilities

TLR Teaching and Learning Responsibility – agreed payments, defined within the Pay Policy, made to teachers for an additional responsibility

Trust Deed The deed by which a voluntary aided or a voluntary controlled school has been established **Trust School** a foundation school. Some schools will need to acquire foundation status to become a trust school, meaning they will take on specific responsibilities which have traditionally been carried out by the Local Authority, including:

- Responsibility for overseeing admissions and appeals processes
- Specific requirement for the make-up of the governing board
- Becoming the legal employers of all staff
- Managing the school premises.

Where Trust Schools are different from other maintained schools is that they are supported by a charitable trust. The Trust is made up of partners, community organisations and sometimes businesses, which share and support the strategic direction of the school or schools

UNISON Union of Public Employees. Many school support staff will be members of this union

Virtual school Looked after children are on a virtual school roll, and each local authority will employ an experienced teacher to oversee the educational progress of all children under the care of that particular LA. The virtual school headteacher will have the specialist knowledge to provide extra support to designated teachers in the 'real' schools where the pupils are educated.

They will also work with professionals in the Children's Services department of the council and with all schools in the area to promote the education of children in care. Boards have a responsibility to challenge outcomes for children in care within their setting

VA Voluntary Aided A school set up and owned by a voluntary board, usually a church board, largely financed by the LA. The governing board employs the staff and controls pupil admissions and religious education. The school's buildings and land (apart from playing fields) will normally be owned by a charitable foundation. VA schools set their own admissions criteria in line with the admissions code.

Value Added (VA) The progress schools help pupils make relative to their individual starting points – rather than looking at raw results VA also takes into account the prior attainment, thus enabling a judgment to be made about the effect of the school on pupils' current attainment

VC Voluntary Controlled: usually a denominational school wholly maintained by the LA, but with certain residual rights regarding religious worship

Vertical grouping Classes formed (in primary schools) with children of different age groups

Virement The agreed transfer of money from the budget heading to which it has been allocated to another budget heading

Vision The school's vision should, in a few sentences, describe what the school will look like in three to five years' time. The vision will be developed by the board, in consultation with, and with collaboration from, the senior leadership team, staff, parents, pupils and the wider community

Vocational A subject that would not be considered academic in the traditional sense

Appendix A

12 Key questions for governors to ask

1. **Do we have a clear vision and strategy for the school?**
2. **What are the school's values?**
3. **How does the curriculum relate to our vision for the school?**
4. **What are we doing to raise standards?**
5. **Have we got the right approach to staffing and staff CPD?**
6. **Do we have a sound financial strategy, get good value for money, and have robust procurement and financial systems?**
7. **Do we keep our buildings and other assets in good condition and are they well used?**
8. **How well do we keep parents and stakeholders informed and take account of their views?**
9. **Do we keep children safe and meet the statutory health and safety requirements?**
10. **How does the school promote good behaviour and attendance to enhance learning?**
11. **Do we offer a wide range of extra-curricular activities which engage all pupils?**
12. **Do we have appropriate arrangements in place for data protection, information governance, cyber security and digital resilience?**

NGA-AGREED-FOR-USE-WITH-LINCOLNSHIRE-SCHOOLS-GOVERNING-BOARDS—NOT-FOR-SHARING-WIDER¶

Appendix B

NGA Governing board self-evaluation questions

20 questions for maintained school governing bodies

These questions are designed to help governing bodies reflect on their effectiveness and agree clear priorities for improvement. Each question includes guidance and examples of evidence to help identify strengths and development areas.

How to use these questions

Step 1. Individual reflection

Governors each review the questions and consider the board's performance.

Step 2. Collective discussion

The board comes together to discuss the questions, drawing on individual reflections to agree an overall rating (1 to 5) for each question.

The questions cover:

- Strategic leadership
- Culture and engagement
- Accountability and assurance
- Employer responsibilities
- Governance practices
- Governance structures
- Compliance

Review the full set of questions or focus on one or two areas at a time.

Step 3. Agreeing outcomes

Record your board's strengths, areas for development and agreed actions using the template provided at the end of this document.

DfE guidance referred to throughout the questions include:

- Maintained schools governance guide (MGG)
- Pupil premium guidance
- Good estate management for schools (GEMS)
- Equality Act advice for schools

Strategic leadership

1. Has the governing body ensured the school has a clearly defined ethos and set of values which are evident in policies and practice?



Tick to indicate where the board:

- ☐ has developed values in consultation with stakeholders
- ☐ ensures the values are known and provide a common sense of purpose across the school
- ☐ regularly uses the values as a reference point in its discussions and decision making
- ☐ actively promotes British values

Statutory requirements

- The school fulfils the Public Sector Equality Duty (PSED), setting objectives at least every four years and reviewing progress towards meeting them annually. (MGG 2.1.2)
- Governors and senior staff must declare conflicts of interest. (MGG 2.4)
- Everyone involved in governance is expected to uphold the seven principles of public life. (MGG 2.1)
- The governing body must demonstrate that it is actively promoting fundamental British values. (MGG 2.1)

Possible evidence to look for

- Values statements
- The school website
- Declarations of interest
- Code of conduct

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

2. Have the governing body and school leaders established an ambitious vision* which sets out its aims over the next three to five years?



** In this context, vision can be defined simply as 'what the school wants to achieve'. It should convey, in a few sentences, the school's ambition for the future.*

Tick to indicate where the board:

- ☐ has discussed and approved a vision which looks forward three to five years
- ☐ considers the views of stakeholders in setting the vision
- ☐ ensures the vision aligns with the school's values and mission
- ☐ ensures the vision is ambitious and is sufficiently compelling to drive continuous improvement
- ☐ reviews the vision annually

Statutory requirements

- *In schools with a religious character*, governing bodies must set the school's vision in line with the mission set by the relevant religious authority (MGG 2).

Possible evidence to look for

- Vision statement or equivalent documentation
- Strategic plan
- Feedback from stakeholders
- Board minutes and papers

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

3. Has the governing body discussed and formally approved a strategic plan, with key performance indicators, which enable governors to evaluate the effectiveness of actions taken by leaders to bring about successful change?



Tick to indicate where the board:

- ☐ ensures the strategic plan is set out in a written statement and supports the board's ambitions for delivering excellent education
- ☐ minutes discussion and approval of a limited number of measurable strategic aims which enable governors to evaluate the progress made by the school towards achieving the ambitions set out in its vision statement
- ☐ reviews progress made against the strategic aims regularly and rigorously, evaluating the effectiveness of actions taken to bring about successful change
- ☐ holds school leaders to account for the effective implementation of the strategic plan, ensuring these are a key focus in meetings

Possible evidence to look for

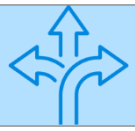
- Vision statement or equivalent documentation
- Strategic plan
- Feedback from stakeholders
- Board minutes and papers

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

4. Does the governing body have a clearly defined approach to risk management which is reviewed and agreed on a regular basis?



Tick to indicate where the board:

- ☐ oversees a whole school approach to risk management
- ☐ ensures a risk management framework for identifying, managing and recording risks and incidents is in place
- ☐ makes sure risk assessments are in place to safeguard and promote the welfare of pupils, staff and visitors
- ☐ reviews all risks regularly including those associated with strategic priorities as identified in the school's strategic plan

Possible evidence to look for

- Risk management process (which may be set out in a policy or framework document)
- Risk register
- Board minutes and papers

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Culture and engagement

5. Does the governing body know and respond to the views of its stakeholders?

Tick to indicate where the board:

- ☐ engages with school leaders to develop a programme of stakeholder engagement activities, including surveys and other means of formal and informal contact
- ☐ ensures the school communicates regularly with parents to help them understand the structure of the school, how the school operates, how they can support their child's education and how they can put their views forward (MGG 2.7)
- ☐ listens and responds to the views of pupils, parents, staff and the local community
- ☐ communicates board decisions clearly to stakeholders
- ☐ ensures the school builds relationships with the local community

Possible evidence to look for

- Stakeholder engagement plan
- Feedback from surveys
- Communication with stakeholders (such as letters).
- School website
- References to stakeholders and their views in minutes and meeting papers

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Accountability and assurance

6. Do governors offer consistent, constructive challenge and support to school leaders focused on bringing about successful change?



Tick to indicate where the board:

- ☐ focuses questions on bringing about successful change, as defined in the strategic plan
- ☐ balances robust challenge with support, asking the right questions in an appropriate manner
- ☐ ensures it gets the range of data and information it needs to hold leaders to account, including access to independent insight (for example from Ofsted, school improvement partners and external auditors)

The chair:

- ☐ ensures the governing body has a diversity of thought and experience
- ☐ recognises inappropriate or lack of challenge from other governors and offers support

Statutory requirements

The governing body must hold the headteacher to account for the day-to-day running of the school, including the:

- performance management of staff
- implementation of the governing board's strategy for the school (MGG 3.1)

Possible evidence to look for

- Board minutes and meeting papers
- Feedback from individual governors

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

7. Does the governing body have a good knowledge of educational standards and pupil welfare across the school?



Tick to indicate where the board:

- ☐ ensures it has the high quality and timely data it needs (such as pupil achievement and standards, including those from specific groups including disadvantaged and pupils with SEND, attendance and behaviour) in a format which allows governors to ask probing questions and monitor progress over time
- ☐ has access to data published by the Department for Education and Ofsted, such as ASP and IDSP reports
- ☐ identifies trends and emerging risks in relation to safeguarding (looking at referral rates, attendance, behaviour incidents, exclusions and external audits)
- ☐ takes into account the wellbeing of staff to ensure that the amount of data collected is proportionate

Individual governors:

- ☐ visit the school regularly to see how policies and improvement plans are working in practice

Possible evidence to look for

- Inclusion of relevant data within board reports (data relating to pupil achievement and standards, attendance and behaviour as well as external measures)
- Governor visit reports
- Board minutes and meeting papers

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

8. Does the governing body ensure that the school delivers a broad and balanced curriculum, enabling all pupils to thrive?



Tick to indicate where the board:

- ☐ considers the effectiveness of the school's approach in delivering a broad and balanced curriculum
- ☐ ensures the school is fully compliant with its duties in relation to pupils with SEND and monitors the provision and effectiveness of support
- ☐ formally discusses and approves the school's pupil premium statement and monitors the impact of actions taken over time
- ☐ considers the views of parents and pupils in relation to the curriculum and their learning

Statutory requirements

- The school curriculum must: be balanced and broadly based; promote the spiritual, moral, cultural, mental and physical development of pupils; prepare pupils for the opportunities, responsibilities and experiences of later life (MGG 7.2.1)
- Governing bodies have legal duties in relation to pupils with SEND that are set out in the Children and Families Act 2014 and must have regard to the statutory guidance in the SEND code of practice. (MGG 7.2.2)
- The pupil premium grant is funding to improve educational outcomes for disadvantaged pupils – school leaders must adhere to the conditions of grant published annually for pupil premium

Possible evidence to look for

- Board reports and minutes
- SEND governor reports
- Other governor visit reports
- Feedback from pupils and parents
- Pupil premium statement

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

9. Does the governing body have a clear strategic oversight of school finances, ensuring the school gets good value for money through its spending decisions?



Tick to indicate where the board:

- ☐ discusses and minutes approval of the annual budget and three-year budget submitted to the local authority
- ☐ ensures all governors have at least a basic understanding of the school's financial position
- ☐ reviews the school's financial performance against the annual budget using regular reports that help governors ask relevant questions
- ☐ considers and approves submission of the School's Financial Value Statement (SFVS) annually, ensuring an action plan is in place for any items partially or not met.
- ☐ uses tools including, for example, financial key performance indicators and benchmarking to ensure the school is getting best value for money

Statutory requirements

- The governing body must oversee financial performance and ensure public money is well spent (MGG 3.4)
- The governing body must submit the schools financial value standard (SFVS) annually to the school's local authority (MGG 3.4)

Possible evidence to look for

- Financial reports
- Board reports and minutes
- Benchmarking information
- SFVS
- Annual budget and three-year budget information

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

10. Does the governing body ensure, as far as possible, that school premises and facilities are kept to a standard where the health, safety and welfare of pupils is guaranteed?



Tick to indicate where the board:

- ☐ regularly considers and approves an estate vision, strategy and asset management plan looking forward to the next five to ten years (GEMS: Strategic estate management)
- ☐ approves the school health and safety policy
- ☐ monitors health and safety, seeking assurance over potential risks that appropriate corrective action is being taken and improvements are being put in place

Statutory requirements

- School premises and the accommodation and facilities provided must be kept up to a standard, where, as much as reasonably possible, the health, safety and welfare of pupils are guaranteed (MGG 7.4)
- Governing bodies must ensure that buildings: provide a safe environment for children, staff and visitors; comply with all relevant regulations, including, but not limited to:
  - health and safety
  - fire safety
  - the control and management of asbestos (MGG 7.16.1)

Possible evidence to look for

- Key documents: estate vision, strategy, asset management plan and strategic review process
- Health and safety policy
- Board minutes and papers

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Employer responsibilities

11. Does the governing body acknowledge its employer responsibilities and ensure staff performance management and wellbeing is properly considered?



Tick to indicate where the board:

- ☐ listens and responds to the views of staff, monitors their wellbeing and workload, and considers strategies to improve recruitment, retention and the working environment
- ☐ ensures opportunities are in place for high quality continuing professional development for all staff
- ☐ approves policies annually for staff pay and appraisal as well as disciplinary, capability and grievance procedures
- ☐ carries out the performance management of the headteacher, with the support of an external adviser appointed by the board
- ☐ maintains oversight of staff pay and appraisal, ensuring the performance management process is effective and promotes staff wellbeing and development

Statutory requirements

- The relevant body (usually the governing body) must adopt, maintain, and implement a compliant pay policy in line with the School Teachers' Pay and Conditions Document.
- In schools where the local authority is the employer, support staff pay must follow local authority scales. (MGG 7.19.1)
- The governing body must approve staff disciplinary, grievance and capability procedures. They must also provide a procedure to enable staff to appeal against a decision to dismiss them. (MGG 7.19)
- The governing body must appoint an external adviser for the headteacher's appraisal (The Education (School Teachers' Appraisal)(England)Regulations 2012 Act)

Possible evidence to look for

- Policies
- Board minutes and meeting papers
- Feedback from staff

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Governance practices

12. Is the recruitment of governors open and transparent, focused on ensuring the board has a range of desirable skills and is representative of the local community?



Tick to indicate where the board:

- ☐ recruits governors in line with its instrument of government and DfE regulations, according to the needs of the governing body
- ☐ ensures it has sufficient governors, with the range skills, experience, diversity of thought and capacity it needs to fulfil its functions
- ☐ regularly considers succession planning for governors and those in board leadership positions (chair, vice chair and link governors)
- ☐ does not recruit governors for more than two terms of office without a particularly rigorous review, considering the need for progressive refreshing of the board

The chair:

- leads on governor recruitment, actively seeking new recruits before vacancies become available
- ensures prospective governors have the necessary skills before appointment
- involves the rest of the governing body in recruitment planning and decision making

Statutory requirements

- The School Governance (Constitution) (England) Regulations 2012 provides that anyone appointed to the governing body must have the skills to contribute to the effective governance and the success of the school. (MGG 4.1)

Possible evidence to look for

- Skills audit
- Governor recruitment practices

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

13. Do governors understand the purpose and importance of governance and have the commitment and capacity to deliver this, including undertaking regular training?



Tick to indicate where the board:

- ☐ ensures thorough and robust governor induction procedures are in place and monitors completion of required training and development activity
- ☐ has access to ongoing high-quality training and sets out clear expectations for engagement with this (such as for annual safeguarding training)
- ☐ plans governor training development with reference to the skills audit, which is updated annually

The chair:

- ☐ ensures all governors understand their role and receive appropriate induction and training as required

Statutory requirements

- Safeguarding training (KCSIE para.79)

Possible evidence to look for

- Skills audit
- Training records

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

14. Are relationships both between governors and between the board and school leaders positive, enabling leaders to share difficulties honestly?



Tick to indicate where the board:

- ☐ makes challenges to school leaders which are appropriate and welcomed by the leaders
- ☐ holds discussions in meetings which are open, professional and indicate mutual respect
- ☐ ensures school leaders feel able to share information fully and honestly to ensure governors have a complete and accurate understanding of financial and educational standards
- ☐ considers and approves a code of conduct annually
- ☐ completes and updates declarations of interests regularly – governors are routinely asked for and record relevant interests in every meeting

The chair:

- ☐ models and reinforces the behaviour and professional standards set out in the board's the code of conduct

Statutory requirements

- Safeguarding training

Possible evidence to look for

- Code of conduct
- Declaration of interests
- Meeting minutes

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

15. Does the governance professional (clerk) offer good quality independent advice and support to governors in meetings, in addition to clear and accurate minutes?



Tick to indicate where the governance professional:

- ☐ provides independent governance advice, guidance and effective administrative support (i.e. is not directly line managed by the headteacher, if an employee)
- ☐ contributes to the efficient, effective and compliant operation of the governing body
- ☐ helps the board to understand its role, legal responsibilities and strategic activities
- ☐ supports the chair in facilitating strategic debate and decision making
- ☐ promotes the flow of information throughout the governance structure (between committees for example)

Statutory requirements

- The governing body must have a governance professional (clerk) to: provide expert procedural advice and administrative support; manage the efficient and compliant operation of the governing body (MGG 4.8)

Possible evidence to look for

- Governance professional person specification and job description
- Feedback from governors and school leaders

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

16. Does the governing body plan an annual programme of activities to consider its own effectiveness?



Tick to indicate where the board:

☐ plans an annual programme of activities to consider board effectiveness and the quality of decision making, the board's efficiency, skills needed for governance, and the individual performance of governors (MGG 6.1)

Activities may include:

☐ open and honest reflection, a 360° review of the performance of the chair, individual meetings to consider the contribution of individual governors, a self-evaluation, an external review of governance (MGG 6.2)

Possible evidence to look for

- Record of discussions
- Feedback from individual governors
- Summary of responses to self-evaluation using 20 questions
- External review of governance

Comments:

Your rating (tick as appropriate):

☐ 1. Not met
☐ 2. Partially met
☐ 3. Mostly met
☐ 4. Fully met
☐ 5. Embedded

17. Has the work of the governing body had a positive impact on standards in all aspects of school life?



Tick to indicate where the board:

- ☐ can detail the impact that it has had on the quality of educational and financial standards over the course of an academic year and in the longer term
- ☐ maintains strong working relationships with school leaders, offering high levels of challenge and support
- ☐ maintains focus on the strategic direction of the school throughout its work, ensuring effective change has taken place

Possible evidence to look for

- Board minutes
- Pupil outcomes
- Financial records
- Evaluation of the impact of leaders in bringing about change against set performance indicators

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Governance structures

18. Does governance documentation ensure that governors have a clear understanding of their roles and responsibilities to hold themselves and each other to account?



Tick to indicate where the board:

- ☐ approves annually the governance delegation planner, committee structure, terms of reference and link governor roles, avoiding duplication of decision making and ensuring a clear separation between the function of governance and school leadership
- ☐ elects a chair and vice chair(s) annually, ensuring the chair has not served for more than six consecutive years
- ☐ approves the appointment of committee chairs, membership of committees and allocation of link governor roles – ensuring the statutory responsibilities for safeguarding, SEND and careers are covered as a minimum
- ☐ ensures role descriptions are in place for link governor roles and individuals are held to account for fulfilling expectations
- ☐ ensures the governance arrangements are published on the school website and communicated to all

Statutory requirements

- Elect a chair and vice chair(s) who must not be a member of school staff (MGG 4.5.2)

Possible evidence to look for

- Governance documentation – possibly included in a school-specific governance handbook – including delegation planner, committee terms of reference and role descriptions
- Governance information on the school website
- Get information about schools (GIAS) records
- Minutes

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

19. Is the work of the governing body well led, run efficiently and focused on the strategic plan and key areas of compliance, with no unnecessary repetition of discussions?



Tick to indicate where the board:

- ☐ ensures the delegation planner and committee terms of reference minimise the possibility of repeating discussions
- ☐ ensures that minutes clearly and accurately record key discussion points and decisions made
- ☐ attends meetings having read all meeting papers and prepared questions

The chair:

- ☐ ensures meetings run to time and are impactful
- ☐ ensures meetings stay focused on strategic matters and do not drift into operational discussions
- ☐ ensures all voices are heard and no one dominates discussions
- ☐ communicates effectively with all those governing both during and outside of meetings
- ☐ works with the governance professional and headteacher to plan meetings and their agendas which focus on the strategic plan and key areas of compliance
- ☐ manages any other business effectively

Individual governors:

- ☐ attend meetings having read reports/papers and prepared questions in advance
- ☐ abide by the code of conduct and support the work of the board

Possible evidence to look for

- Meeting agenda planner for the year
- Minutes and agendas
- Scheme of delegation

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Compliance

20. Does the governing body assure itself that there is compliance with all its statutory duties?



Tick to indicate where the board:

- ☐ ensures there is a policy review schedule in place which covers all statutory duties and that relevant agenda items are covered in a timely fashion
- ☐ ensures the school annual meeting agenda planner identifies all statutory duties which need review during the year
- ☐ ensures safeguarding (including Prevent duty) responsibilities are fully met, including policies, training, and effective monitoring
- ☐ sets equality objectives at least every four years and reviews progress towards meeting them annually, in line with the Public Sector Equality Duty
- ☐ is aware of the risk of cybercrime, and ensures the school puts in place proportionate controls and takes appropriate action where a cyber security incident has occurred

Statutory requirements

- Statutory policies are reviewed in line with statutory expectations.
- Schools are required to prepare and publish equality objectives, as set out in chapter 5 of the DfE's Equality Act advice for schools

Possible evidence to look for

- Policy review schedule
- Annual meeting planner

Comments:

Your rating (tick as appropriate):

- ☐ 1. Not met
- ☐ 2. Partially met
- ☐ 3. Mostly met
- ☐ 4. Fully met
- ☐ 5. Embedded

Evaluation summary

What strengths has the governing body identified?
What are the key areas requiring development?
What steps will the board take to support improvement? *Ensure actions are clear, owned, and time-bound so that progress can be monitored.*