

Clerks/Governance
Professional Briefing
Summer 2026

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LCC Governor Services



Agenda

- **Governor Services Updates:**
 - Update on Governance Resources
 - Requirements to inform Governor Services on changes / minutes
 - Vacancies Update
 - Chair/Vice Chair Elections
 - Pay Committee
 - Memorandum of Understanding
- **Briefing Updates:**
 - Diocesan Update
 - Governance in the Summer Term
 - School Estates Management
 - Risk Register
 - Governing Body Effectiveness
 - Stakeholder Engagement - Ofsted
 - LCC and other Updates

Governor Services Updates

Update to Governance Resources

- Governor Services Governor and Clerks Resources and all briefing presentations can now be found on the NEW Governor Services Professional web page:

Governor Services

[Home](#) | [Governor Services](#) | [Governor Services](#)



We support governing bodies in Lincolnshire schools, and provide advice, guidance and support to all stakeholders. This helps ensure they remain compliant in their statutory duties, particularly in maintained schools.

This support includes:

- appointment and election of governors
- correspondence related to the governance of schools
- enquiries and requests for advice from school governors and clerks
- review of instruments of governance for school governing bodies
- signposting to relevant governance training and resources for continued development of governance
- responsibility for maintaining records of Maintained Schools' Governing Bodies

To contact us for advice and guidance please email Governorsupport@lincolnshire.gov.uk.

If you require telephone support, please email us to request a priority call back.

Governance Resources

[Governance Training Offer](#)

[Clerk Resources](#)

[Governor Resources](#)

Governor Services Updates

Requirements to inform Governor Services

Maintained Schools:

- [Chair and Vice Chair Form](#)

Completed annually in Autumn Term and when necessary, through academic year

- [Governance Information Form](#)

For all governance appointments, Resignations, and **updates to contact information** for Clerks, HEADTEACHERS and all Governors, including associate members.

Please ensure that you complete the “school name” box on the form.

Please also send details of new maintained Headteachers to educationteam@lincolnshire.gov.uk

Please inform The Diocese if a foundation governor resigns or becomes a member of staff

- FGB Agenda:

Where a change of school category is being considered (ie Academisation)

- Minutes:

FGB and Extra-ordinary FGB minutes

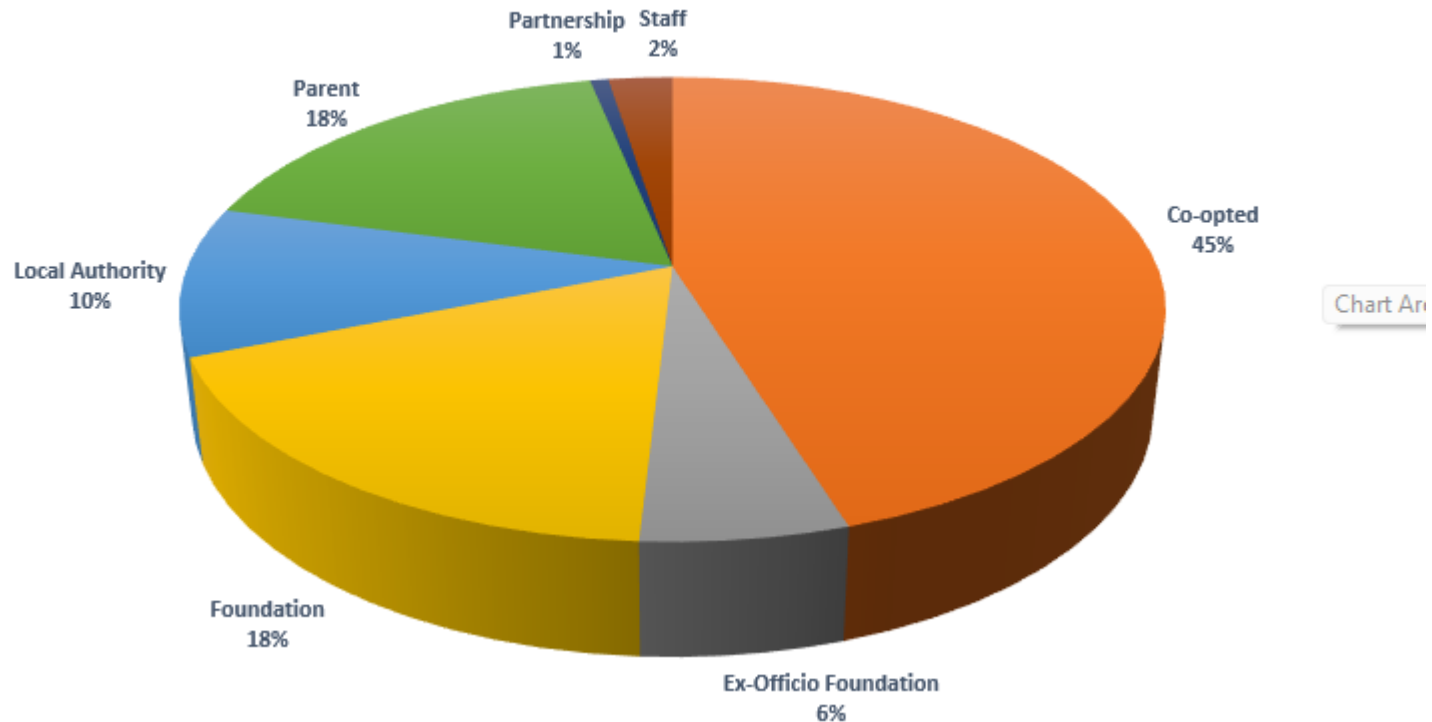
Finance Committee (where appropriate)

ESCALATION PROCESS IS NOW IN PLACE:

CoG, HT and Locality Leads will be cc'd into emails requesting outstanding information

Maintained School Governor Vacancies

18.39% Total Governor Vacancies on 24 March 2026



As part of the annual review of the Instrument of Government, the governing body should be asked to consider its constitution where there are longstanding vacancies, with reference to [the Constitution of Governing Bodies of Maintained Schools](#) and the relevant [LCC guidance](#).

ELECTION OF CHAIR & VICE CHAIR

- Every Maintained School Governing Body **MUST** have a Chair and Vice Chair of Governors.
- A procedure is required for the election of the Chair of Governors and is usually held at the first meeting of each Autumn Term **and at any other meeting during the year when the position of Chair of Governors becomes vacant. This should be the first order of business on the agenda at the appropriate FGB meeting.**
- A procedure is also required for the election of Vice-Chair of Governors.
- Governors who are paid to work at the school cannot be elected as Chair or Vice-Chair.
- **The Governing body agrees on the length of term of office of the Chair and Vice-Chair before the election. The minimum term of office is one year and we recommend a maximum of 2 years.**
- There is no automatic appointment if there is only one candidate. The governing body must still vote on the appointment and can vote against the appointment of the particular candidate.
- The vote taken by the governing body with either be a show of hands or a secret vote in writing. The method will be determined by the governing body before the voting takes place.

THE ROLE OF A CLERK – Administrative Capacity

Pay Committee:

Pay Committee is mandatory in schools that ratify the LCC Pay Policy

- Is clerked by the Clerk to Governors.
- Consists of 3 governors.
- **Governors who are staff and the Chair of Governors are disqualified from membership.**
- Best practice advice from HR states that where practicable, the members of HTPM and Pay Committee should be separate
- The teaching staff, including HT, will receive a written confirmation of the outcome of the annual salary review.
- The Pay Committee meets by 31st October annually to complete the teacher salary review.
- The Pay Committee meets by 31st December annually to complete the HT salary review.
- THIS COMMITTEE REPORTS IN FACT TO FGB ONLY.

MEMORANDUM OF UNDERSTANDING (MOU)

A Memorandum of Understanding (MOU) is the legal document used by governing bodies where joint staffing arrangements are to be agreed between maintained schools or between a maintained school and other category of school (eg where a HT/DHT may be providing HT services to another school).

Please see the below guidance for Governing Bodies:

- The Education Locality Lead requests the MOU template from Legal Services.
- The Education Locality Lead sends the MOU template to Chairs of Governors of both the employing school and the school requiring the staffing support.
- Chairs of Governors discuss and agree the details of support required under MOU with input from the Education Locality Lead and/or relevant school leader.
- The employing school's Governing Body drafts the MOU and forwards it to the Governing Body of the school receiving the support.

(Governing Bodies can seek advice from Legal Services and the Schools' HR officers as appropriate)

- Each Chair of Governors places a confidential item on the next Full Governing Body (FGB) agenda. The MOU is sent to the clerk for circulation with the FGB papers.
- Governing Bodies to review and agree MOU during FGB meeting and appoint appropriate Joint Governance Committee members.

(Information on the number of governors to be appointed is contained within the MOU template)

Only in urgent situations where an FGB meeting cannot be convened in time, can the Chairs of Governors agree the MOU under delegated authority.

This must be reported in writing immediately to the governing body with a copy of the MOU

A fully signed copy must be stored within each school's governance records.

A fully signed copy must also be provided to the Education Locality Lead who will retain it according to the Local Authority's records retention policy.

BRIEFING UPDATES

Governor and Clerk to Governor Briefings



The Diocesan
Board of Education

Thursday 7th May 2026

5:30pm-7:00pm

Online

FREE



These free online briefings are to share updates of current key information for Church school governors and clerk to governors, led by members of the LDBE team. The session will include Diocesan updates, national key updates and information on a wide range of topics, as well as being an excellent opportunity to meet other governors and clerks of Church schools to share best practice advice.

Book a place at:

<https://www.lincolndiocesaneducation.com/governance>



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Governance in the Summer Term

- **Membership**

Please ensure that you are reviewing membership and the governing body are reviewing succession planning, training, skills audits
Governing bodies should also review their Instrument of Government to ensure that it is fit for purpose.

- **Attendance**

Attendance remains a key priority for the DfE.

Governance Considerations:

- **Has your board appointed an attendance governor in line with the LA Attendance Policy?**
- **Are parents and carers aware of the school attendance policy?**
- **How is attendance monitored in your school to identify trends and concerns? Is this measurement also year on year?**
- **How do trends and patterns differ between year group/pupil cohort (eg disadvantaged, SEND, boys vs girls, vulnerable)**
- **How are we supporting pupils with absence issues? What strategies/processes are in place and are they effective?**
- **Is there a robust action plan in place to improve attendance?**
- **Is attendance training part of all staff's CPD?**
- **Have you seen the school's Attendance Baseline Improvement Expectation (ABIE)?**

- **Finance**

Review of end of year budget and ratification of 26-27 budget at a Full Governing Body meeting and returned to LA by 31st May 2026.

DfE guidance - [Helping schools manage resources and money: guidance for governors - GOV.UK](#) which contains links to useful resources.

Governance Considerations:

- **Is the proposed budget realistic and based on all available and up-to-date information (eg pupil numbers)**
- **Are we publishing the required information for grant funding?**
- **What, if any, assumptions have been made when compiling the budget (eg staffing numbers) and will these be robust enough for any variables in pupil numbers?**
- **Is there sufficient funding to deliver the curriculum (eg staff costs and resourcing?)**
- **Have all areas of the budget been reviewed to identify potential savings?**
- **Are there any variations between last year's budget and the proposed budget?**
- **If so, what are the reasons for the variations?**

Governance in the Summer Term

- **Health and Safety**

Information: The NGA will be releasing a new Governor Health and Safety Module in March 2026

- **Policies**

Please ensure that the governing body has reviewed and ratified policies in line with their policy schedule.

Ensure that the school has an up-to-date written policy for Relationships Education for September 2026. (The RHSE curriculum should be updated also)

- **Safeguarding**

Governors ensure that their setting is compliant to the STATUTORY [Restrictive interventions, including use of reasonable force, in schools guidance](#) which is effective from 1st April 2026.

Governance Considerations:

- Are we fully compliant with the statutory duty to record and report every significant incident involving the use of force or seclusion, and are our systems robust enough to meet the requirements from April 2026?
- Do we have clear, up-to-date policies on restrictive interventions that reflect the statutory elements of the guidance, and are these policies effectively communicated and understood by staff?
- Are we assured that restrictive interventions are being used only as a last resort, with strong emphasis on prevention, early support and de-escalation strategies?
- Do staff receive appropriate training to ensure any use of force is lawful, proportionate, safe and consistent with safeguarding expectations, including avoiding prohibited techniques?
- Are we reviewing incident data regularly to identify patterns, safeguard pupils—particularly those with SEND

Maintained Schools and Academies that purchase the LCC Safeguarding Audit should have reviewed and signed off the governor section at a Full Governing Body meeting ready for submission to the LA by 6th June 2026.

- **School Uniform**

From September 2026, subject to the Children's Wellbeing and Schools Bill receiving Royal Assent, schools are expected to be limited to no more than 3 compulsory branded uniform or PE items (four in secondary if one is a tie).

- **Stakeholder Engagement**

- **Staff Appraisal Report**

Receive a Staff Appraisal Report – please review LCC [Teacher](#) and [Support Staff](#) Appraisal policies for more information.

Governance in the Summer Term

SEND – continue to ensure that the school is meeting all the needs of children within its core and non-core curriculum.

Governance Considerations:

- Has the SENCO completed the National Award for SEN Coordination qualification?
- How often do staff receive training on SEND? What has been covered in recent training and what is coming up?
- What external support does the school access (for example from the Local Authority or from specialist support services)? Do staff feel confident about meeting the needs of pupils with SEND? What plans are in place to address any concerns?
- Does the SENCO have sufficient time to carry out their role effectively?
- Has the school published the [SEN information report](#) online? Is it updated annually?

Information

- Review the updated [SEND: Governance for school governing boards guidance](#) which includes a checklist.
- Review the Council for Disabled Children have released guides and training [resources](#) including a [guide for governors and trustees](#)
- **School Development/Improvement Plan Monitoring**

Governing Bodies should be monitoring the SDP/SIP regularly, triangulating evidence, reviewing impact and reporting their findings particularly coming to the end of the academic year.

Governance Considerations:

- Are you following the Governor Monitoring/Assurance Policy?
- Are you ensuring that you complete the Monitoring/Assurance Visit Template?

- **School Plans for 2026 Exams**

KS 2 tests – assign a governor to monitor testing arrangements

KS 4 & 5 – Governors should be aware of arrangements for external summer exams.

- **Wellbeing**

Information

9000 Lives have produced this useful resource: [School Governors: Asking the right questions about mental health](#)

Education Support have released this useful resource:

[Supporting SEND provision and staff wellbeing: a guide for leaders](#)

Governance Risk Registers

- Risk registers are mandatory in academies - <https://www.gov.uk/government/publications/academy-trust-financial-management-good-practice-guides/academy-trust-risk-management>
- Maintained schools should produce a risk register and review it adequately to manage risk. A risk register includes the main risks to the school’s strategic aims and should include information about how risks are controlled. The risk register is not to be confused with a risk assessment which are for specific tasks, events or activities.
- The Headteacher will make a list of the school’s objectives and record threats, likelihood of threat, predicted impact on objectives and controls to mitigate threats.
- The governing body is responsible for reviewing this register and is a useful reference when making strategic decisions and will inform school improvement planning.

The NGA have a simple pro-forma template for members which may prove useful for schools and governing bodies to implement.

Risk (description + category)	Existing controls	Likelihood	Impact	Severity (likelihood x impact)	Additional control measures required	Risk owner
Current level of risk is above acceptable level (action required)						
Serious	Safeguarding	2	4	8	Introduce	Headteacher
	advisors					
Risk reduced to acceptable level (effective controls implemented, with effective monitoring in place)						

- **Identify the risk**
- **Consider the likelihood – Scale 1-5**
- **Consider the impact - Scale 1-5**
- **Rag rate the register by colour (Red, Amber, Green)**
- **Red – review termly**
- **Set Amber and Green review timings appropriately**

School Estate Management Standards

The DfE have released [new guidance](#) to help schools and colleges plan, prioritise and deliver estate improvements that address condition, suitability, resilience and decarbonisation. The guidance signposts to multiple resources for information on how to manage a school estate.

The DfE have also released a new service - [Manage your education estate - GOV.UK](#): Use the service to:

- find resources and guidance to help you manage your estate
 - view data about the condition of your estate
 - view your funding allocations
 - explore DfE funding opportunities
 - read updates about estate management policy, guidance and more
-
- The Education Estates Strategy sets out a strengthened national framework requiring all schools and trusts to improve strategic leadership, long-term planning and assurance across safety, condition, sustainability and digital readiness. From Autumn 2026, every Responsible Body must submit an annual SEMS return confirming compliance with strategy, maintenance, data and risk expectations. Governing boards retain core duties in strategic leadership, risk oversight and financial stewardship, with increased expectations around lifecycle investment, stronger reporting, and oversight of statutory compliance including RAAC, fire, asbestos and structural risks.
 - Over the next 12 months, boards are expected to benchmark their estate management practice against SEMS Levels 1–3, strengthen assurance reporting through quarterly dashboards, and update estate visions and asset management plans to reflect lifecycle renewal and resilience priorities. Trusts must also prepare for the 2026 SEMS return with robust evidence trails, ensure digital readiness for the rollout of [Manage Your Education Estate \(MYEE\)](#), and embed sustainability through Climate Action Plans and carbon-reduction oversight.
 - Responsible bodies will be contacted in April 2026 to be part of pilot schemes. This will inform the national rollout from Autumn 2027.
 - First annual return of school estate management standards to be made in Autumn 2026.

The DfE have also released [interim guidance for responsible bodies](#) on condition surveys until new technical standards are published in 2026.

Please also be aware of this DfE [guidance for governors on preparing for the PSTN and ISDN switch off](#).

Governing Body Effectiveness

The Maintained Governance Guide – offers advice on effective leadership in Section 1.2 under Evaluation:

- **Evaluation**

Regular evaluation to monitor and improve the quality and impact of governance by:

- completing regular skills audits, aligned to the school's strategic plan, to identify skill and knowledge gaps and inform:
 - recruitment needs
 - training and development plans
 - induction of new governors, including training on [keeping children safe in education](#) and keeping pupils safe online in education
- **regularly reviewing the governing body effectiveness, how well governors work together, individual governors' performance and their participation in discussions**
- **commissioning external reviews to get an independent assessment of the governing body's effectiveness and areas for development, particularly at key growth or transition points**
- following legal requirements for document retention and accurately documenting:
 - evidence of the governing body and its committees' discussions and decisions
 - any evaluation of the governing body's impact

Information:

The NGA recommend completing the effectiveness exercise annually. NGA Resources – Available to NGA members only:

NGA [maintained-20-questions-202530930.docx](#)

NGA [Governor/trustee evaluation template | National Governance Association](#)

- GovernorHub resources:

[Governing/trust board self-evaluation: resources | GovernorHub](#)

[Governor and trustee appraisal: templates and guidance | GovernorHub](#)

- Review the LCC Governor Information Pack – Annex B - [governor-information-pack-2025-26](#)

DfE guidance - [External reviews of governance: guide for schools and academy trusts - GOV.UK:](#)

- [External reviews of governance | National Governance Association](#)

LA Updates

- **The Local Authority Parent Election Guidance has been updated (Guidance Notes – statutory checks)**
- **LCC Child Protection Policy** – the policy has been revised in the “use of school premises” and was released on 23/3/26.
- **LCC HR Family Leave and Disciplinary Policies** have been updated.
- **Whistleblowing Policy**

A reminder that each school must publish their own Whistleblowing Policy – this may be based on the LCC Policy but should be tailored to the individual school setting.

<https://www.gov.uk/guidance/whistleblowing-procedure-for-maintained-schools>

- **Data Protection in Schools – Record keeping and management**

It is essential that schools maintain accurate and up-to-date records relating to personal data. The government has published data protection guidance specifically for schools, which includes detailed guidance on records management and retention: [Data protection in schools - Record keeping and management - Guidance - GOV.UK](#). Within the “*Create a Data Retention Schedule*” section, you will find statutory retention periods relevant to schools, including a dedicated section on staff records. Where a specific record type is not listed, schools are advised to determine an appropriate retention period based on the business need. It is important to establish clear policies and processes to demonstrate that personal data is not being retained for longer than necessary.

Please also note that all schools, including maintained schools, are their own data controller for data protection purposes. This means each school is responsible for implementing and adhering to its own retention schedule, rather than relying on the local authority.

- **Teaching and Learning Responsibilities (TLR)**

From 1 September 2026 the School Teachers’ Pay and Conditions Document (STPCD) will include the requirement that Teaching and Learning Responsibility (TLR) payments for school teachers will be paid based on the proportion of responsibility the teacher carries out, rather than their contracted hours.

The ending of pro rata TLRs is a significant shift in the way TLR payments must be applied.

[Teaching & learning responsibility \(TLR\) payments | Local Government Association](#).

Other Updates

Website Reporting

- Please ensure that the governing body undertake a school website review and ensure that all statutory reporting has been undertaken – **NOT ONLY GOVERNANCE**

[What maintained schools must or should publish online - GOV.UK](#)

[What academies and further education colleges must or should publish online - GOV.UK](#)

- Governors should be ensuring that their school setting is working to the [Mobile Phones in Schools guidance](#) from April 2026.
- The [DfE have announced](#) that as from 5th March 2026 – allergy pens must be stocked in schools along with compulsory training for staff.

CONSULTATIONS

- SEND Reform: putting children and young people first – [Consultation](#) – closes 18th May 2026
- Support for pupils with medical conditions at school – [Consultation](#) – closes 15th May 2026
- Growing up in the online world: a national [consultation](#) – closes 26th May 2026

NGA Learning Link Reminder!

- A NEW version of NGA Learning Link has been released on 1st April 2026.
- [Instructions](#) are available to access the new platform for Lincolnshire Governance users.

Other Useful Governance Resources

- [Children in Care: The Guide for School Governors](#)

Governor Services Training Offer

2025-26

- The [Governance Training Offer 2025-26](#) is now available via the Governor Services web page.
- Please give us your [feedback on training](#) so that we can plan the next academic year.

Governance Training Offer

[Home](#) | [Governor Services](#) | [Governance Training Offer](#)



The Local Authority is committed to giving governors and trustees the opportunity to access quality training opportunities via virtual online training sessions which are free, unless otherwise stated. The Local Authority continues to purchase the NGA Learning Link platform for maintained school settings in Lincolnshire, to give governors the opportunity to access training materials online.

If you require a specific type of support that is not listed in this offer, please email Governorsupport@lincolnshire.gov.uk.

We look forward to welcoming you to the sessions and hope that you find them useful on your governance journey.

Governance Training Offer

[Governor Partnership Briefings](#)



[Governor/Trustee Training Offer](#)



[Clerk/Governor Professional Training Offer](#)



[NGA Learning Link](#)



Governor Partnership Briefing [DRAFT]

Multiple dates and times

📍 Online, Microsoft Teams

[Book tickets](#)

NEED HELP?

[Manage tickets](#)

To support all Governing Boards, Lincolnshire County Council delivers FREE Governor Partnership Briefings in the autumn, spring and summer terms. These provide key strategic summaries so Governors/Trustees and Clerks/Governance Professionals are kept up-to-date.

All briefings are virtual - held in the afternoon at 2:00pm and repeated again in the evening at 7:00pm. There is no need to attend both sessions.

FUTURE GOVERNANCE EVENTS

CLERKS/GOVERNANCE PROFESSIONAL TRAINING SESSIONS

- **13/05/26** – Induction Training for Clerks – Maintained Schools only

GOVERNOR PARTNERSHIP - SUMMER TERM:

24/06/2026 - Governor Partnership Briefing

SUMMER TERM GOVERNANCE TRAINING:

- **07/05/2026** – Supporting the Education of Children in Care and Previously Looked after children
- **14/05/2026** – School Food Standards – is your school compliant?
- **20/05/2026** – Induction Training for New Governors – Maintained Schools only

Thank you for attending.

Your feedback is important to us
complete the [Feedback Form](#) or

