

Clerks/Governance **Professional Briefing** **Autumn 2026**

Jo Trotter / Sarah-Jane Eggleton
LCC Governor Services



Agenda

- **Governor Services Updates:**
 - LCC Staffing Updates and Education Sector Update
 - Reminder of Governor Services Communications
 - Updates to Clerks Resources
 - Requirements to inform Governor Services on changes / minutes
- **Membership of Governing Bodies – to include:**
 - Maintaining Records and End of Term of Offices
 - Statutory Requirements – Register of Interests/GIAS
 - LA Governor Appointment/Re-appointment Process Reminder
- **Briefing Updates:**
 - Diocesan Update
 - Governance in the Autumn Term
 - OFSTED
 - AI in Schools
 - Cyber Security
 - LCC Updates:
 - HR
 - Audit and Risk Management (including common findings)
 - NGA Learning Link
 - Governance Training Offer 2026-27
- **Future Discussion Topics/Forum Topics?**

Governor Services Updates

- **LCC Staffing**
- *Head of Service for School Strategy – Geraldine Willders*
Education Locality Leads:
 - Boston and South Holland – Alison Merrills
 - City of Lincoln and West Lindsey – Katie Gravil
 - East Lindsey – Michelle Dewland
 - South Kesteven – Michelle Waddell
 - North Kesteven – Helen Okrafo-Smart
- *Head of Service for School Standards – Matt Spoors*
Place based Education Locality Leads:
 - Gainsborough – Angie Waplinton
 - Lincoln City – Debbie Barks
 - Skegness and Boston – Anna Coney
 - Grantham – Cathryn Stratton

Governor Services Updates

Reminder of Governor Services Communications

- The Governance Newsletter will be issued at the beginning of each small term and will contain relevant information for governors and clerks/governance professionals.
- The Governance Update will only be used if there are emergent issues that governors need to be aware of.
- Governor Support telephone line – is still being **OPERATED ON A CALL BACK BASIS.**

Governor Services Updates

- The Governor Services Professional Page has been upgraded over the holidays:

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](#)

[Headteacher Resources](#)

Governor Resources

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

[Governor partnership briefings](#)



[Governor information pack 2026-27](#)



[LCC finance information for governors](#)



[LCC safeguarding information for governors](#)



[LCC counter fraud information for governors](#)



[Governor Services Briefing Papers](#)



Governor Services Updates

Update to Clerks Resources

- **Clerking Handbook** has been reviewed and uploaded to the Clerks Resources Section
- **Clerks Resources** have been reviewed and uploaded to the Clerks Resources Section
- **Annual Planner Template** – this has been substantially updated with notes throughout for information.
- **Terms of Reference** – Circular now available online – amended from 2025
- **Governance Information Form** – available on the Clerks Resources Section
UPDATED FORM FOR 2026-7 – LAST YEAR'S FORM WILL NOT BE ACCEPTED AFTER 25TH SEPTEMBER 2026.

Clerk Resources – Professional Resources

- **NGA Resource Update:**
- Code of Conduct 2026 now available
- Skills Audit and Matrix – both online and paper version available

Governor Services Updates

Requirements to inform Governor Services

Maintained Schools:

- Chair and Vice Chair Form
- Appointments, Resignations, and updates to contact information for Clerks, HEADTEACHERS and all Governors
- Please include associate members
- Minutes – Finance and FGB – per term please
- FGB Agenda – where a change of school category is discussed (ie Academisation)

ESCALATION PROCESS IS NOW IN PLACE:

CoG, HT and Locality Lead will be cc'd into emails requesting outstanding information when sufficient reminders have been sent without a response being received.

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

Membership Reminders

Maintaining Records and End of Term of Offices

- End of term of offices review
- Parent/Staff Election and LA Governor Guidance available

Statutory Requirements - Interests:

- Personal, Pecuniary & Register of Business Interests
- Governing Roles at other establishments

Statutory requirement to post this information on school website

GIAS

- Information to be provided by Clerks/Governance Professionals to School/Academy to upload
- Reminders from GIAS 6 months before governor term of office end

IT IS A STATUTORY REQUIREMENT TO UPDATE THIS INFORMATION

GDPR

- The LCC Governance Information Team strongly recommends that governors use a school email address particularly where governance paperwork is being emailed.
- LCC also require that at least the CoG has a school email address to receive any Local Authority correspondence in relation to governance
- Please ensure that governors receive a report annually from the Data Protection Officer and have reviewed the relevant policies/publication schemes appropriately.
- **Governing boards should have training that covers GDPR legislation and compliance and refresh it regularly**

Membership

Local Authority Governors (Maintained Schools)

- **ALL CLERKS ARE SENT A REMINDER AT LEAST 4 MONTHS BEFORE THE END OF TERM OF OFFICE DATE OF THEIR LOCAL AUTHORITY GOVERNOR**
This reminder will contain a link to the Local Authority Governor process and skills criteria form.
- Nominated by the Local Authority in line with the skills and experience required by the Governing Body – please ensure that you include any skills matrix/effectiveness evidence appropriate to the process.
- Appointed by the Governing Body at a FGB meeting subject to nomination letter being received from the Local Authority.
- The date of appointment would be the FGB meeting date on which these governors are appointed by the Governing Body.
- **THERE IS NO RIGHT TO AUTOMATIC RE-APPOINTMENT ON THE END OF TERM OF OFFICE – THE LOCAL AUTHORITY GOVERNOR RE-APPOINTMENT PROCESS MUST BE FOLLOWED**
- **THE GOVERNING BODY CANNOT APPOINT/RE-APPOINT A LOCAL AUTHORITY GOVERNOR WITHOUT A NOMINATION LETTER FROM GOVERNOR SERVICES**

BRIEFING UPDATES

Lincoln Diocesan Board of Education Update

For advice and support please contact Kim Dove:
kim.dove@lincoln.anglican.org

Termly Governance briefings, next session 29th September 2026 - 5.30 to 7pm
book at [Governor and Clerk to Governor Briefing - Diocese of Lincoln Board of Education](#)
This is free of charge, and all schools are welcome to attend.

Termly Governor Induction training please see our website for dates and prices.

LDBE website includes lots of resources and guidance
<https://www.lincolndiocesaneducation.com/governanceinformation>

Foundation Governor vacancies. We are keen to help schools find governors – please send adverts to Kim and we will advertise on our website and actively help in the search.

When to contact LDBE

- **DBS checks for foundation governors**

Foundation governors should be DBS checked at the start of every new term of office, which is usually every 4 years. Please send DBS certificate numbers for foundation governors to Kim for our records.

- **Appointment or resignation of clerk**
- **Resignation of foundation governor**
- **Foundation governor intending to apply for a new term of office**
- **Enquiries from potential foundation governors**
- **Any issues or concerns regarding foundation governors or ex-officio foundation governors**
- **For support recruiting new foundation governors**
- **Any other changes that you think we should know about**

GOVERNANCE IN THE AUTUMN TERM

Governance and Board Effectiveness

- **Chair/Vice Chair Elections**
Agree length of term of office of CoG/VCoG (maintained schools) – process guidance sheet available
- **Apologies**
A reminder that the governing body are giving consent to apologies or not.
Consent should be recorded as approved/not approved to ensure that disqualification for non-attendance can be implemented correctly.
- **Declarations of Interest**
Please ensure that your governors comply with the statutory requirement to declare interests and register any pecuniary interests.
- **Membership Items:**
 - Eligibility
 - Membership Update
 - Review Governance Attendance (if not completed in Summer Term 2 of previous academic year)
 - Code of Conduct – NGA have released an updated 2026 version
 - Terms of Reference & Delegation Planner
 - Review of Governor Induction Pack
 - Appointment of Governor Roles (including governors to monitor SDP/SIP Priorities)
 - Committee Membership (Maintained Schools):
 - Finance Committee** (appointment of members and Chair/Vice Chair at FGB meeting)
 - Pay Committee** (Membership excludes the Chair and Staff members)
 - HTPM Panel** (3 Governors) and MINUTED agreement of appointment of **external advisor**.
 - Skills Audit – Ensure that these have been completed to aid governor recruitment
 - Agree/Review Governor Training plan
 - Agree/Review Governor Monitoring/Assurance plan
 - Consider collaboration working arrangements

GOVERNANCE IN THE AUTUMN TERM

Strategy, Risk and School Improvement

- **Review SEF**
- **Approve/Review SDP**
- **Agreed Governing Board Priorities/Governance Strategic Plan** (*includes Vision, Values and Culture Refresh/Review informed by previous year's engagement outcomes*)
- **Risk Register**

Please ensure that that governing board has a mechanism for measuring and mitigating risk.

Church School Distinctiveness

For Schools subject to SIAMS inspections – see notes on exemplar annual planner for more information.

Finance, Resources and Estates

- **Budget Monitoring**

Please ensure that the governing body are reviewing the relevant financial documentation throughout the year and start planning SFVS completion.

- See notes on exemplar annual planner for more information and Section 7.3.1 in Maintained School Governance Guide on FSM Expansion Grant and Inclusive Mainstream Fund
- Finance Governors may find [this DfE webpage](#) useful
- There is useful [Finance Information](#) and [Finance Training documentation](#) for maintained school governors on the Governor Services Professional page.

- **Asset Register**

Ensure that the governing board are advised that school holds an asset register – this may be held under the estates management umbrella of information.

- **Health & Safety**

- See notes on exemplar annual planner for more information.

- **Estates Management and Sustainability**

Estates Management

- [The Standards describe four maturity levels and set specific board requirements](#)

The governing board must be able to demonstrate informed strategic oversight, rather than reliance on headteacher or premises manager reporting.

The Local Authority is responsible for submitting the annual return for Community & Voluntary Controlled Schools.

Sustainability

Have the governing body been assured that the school has a sustainability lead and a Climate Action Plan in place?

See section 7.16 in Maintained School Governance Guide

GOVERNANCE IN THE AUTUMN TERM

PLEASE ALSO REFER TO THE ANNUAL PLANNER FOR SCHOOL SPECIFIC ITEMS AND AUTUMN TERM 1 NEWSLETTER

Headteacher Report

Please ensure that the governing board have the relevant report before the meeting. The report should contain the information that the governing board have agreed, and we expect that it will include statutory reporting elements.

Educational Performance, Inclusion and Equality

- **Review prior year outcomes**
 - See notes on exemplar annual planner for more information.
 - Also see Section 2.12 of Maintained School Governance Guide updated under Equality, Diversity and Inclusion

Safeguarding, Attendance and Behaviour

– Safeguarding

May be included in HT report – please ensure that staff and governors have completed relevant training for 2026. NGA have released their Safeguarding module and new PREVENT module for governors. A reminder that [Keeping Children Safe in Education](#) 2026 is now in use. New statutory information from 30th September 2026 - [Information sharing to safeguard children and young people - GOV.UK](#)

– Attendance

Ensure that the governing body are monitoring patterns, reviewing the school attendance policy and school attendance strategy. Please ensure that the governing body are aware of the pupils in alternative provision and that they are assured that appropriate checks are undertaken.

A reminder that [Working together to improve school attendance](#) is now statutory guidance.

– Behaviour

Please ensure that the governing body is meeting all requirements under [Use of reasonable force and other restrictive interventions guidance](#) which came into force in April 2026.

Information Governance and Digital Resilience

- **DPO report**
- **Cyber and Data Breaches Report**
 - See notes on exemplar annual planner for more information.
 - See Sections 7.7.3 and 7.7.4 in Maintained Governance Guide on Cyber Security and Digital and Technology Infrastructure

GOVERNANCE IN THE AUTUMN TERM

Culture, Stakeholder Engagement and Wellbeing

• Wellbeing Priorities

Please ensure that the governing board are regularly considering how the school promotes and supports the mental health and wellbeing of staff and pupils. Governing boards should monitor implementation and impact rather than become involved operationally.

- See notes on exemplar annual planner for more information.
- Also see Section 4.7 of Maintained School Governance Guide on Staff Wellbeing

Governor Monitoring/Assurance Visit Reports

Expected that these may be included in sections where specific visit items are discussed, if not please use separate agenda section.

- See notes on exemplar annual planner for more information.

Policies

• Policy Delegation Planner Approval

• Policies for ratification

- Safeguarding and Child Protection (LCC Policy)
- Governor Allowances (Statutory policy for Maintained School Governing Bodies)
- Allergy Safety (See section 7.8.3 of maintained school governance guide)
- RHSE (updated to new guidance)
- See notes on exemplar annual planner for more information.

Performance Management of Staff

Please signpost Governing Boards to the relevant Staff Appraisal Policy. ***Please ensure that HT's get relevant advice from HR – particularly this year on TLR payments and Upper Pay Scale decisions.***

Reminder – School uniform and Mobile phone requirements!

Section 7.19 of maintained school governance guide for school uniform

The above is not an exhaustive list of items but covers a general range for a **maintained School** – please use your school's own annual planner to cover all necessary items for your school setting.

GOVERNANCE IN THE AUTUMN TERM

HEADTEACHER PERFORMANCE MANAGEMENT

Maintained Schools

- Panel is normally 3 Governors **AND a board appointed** External Advisor
- No staff Governors, and where possible not to include members of the Pay Committee
- Best practice would be that the Chair and Vice Chair are not both appointed to this panel.
- The Headteacher Standards to be used to inform the performance management targets for headteachers - [Headteachers' standards 2020](#)
- Recommendations are delivered to Pay Committee to meet 31st December deadline for HT pay decision.
- Boards should ensure that they are compliant to the School Teachers Pay and Conditions Document, particularly in respect of the determination of leadership ranges, and sustainability of decisions.
- We recommend that boards contact their HR advisor for further advice.
- **PAY DECISIONS ARE NOT DISCUSSED AND AGREED AT FGB MEETINGS.**

GOVERNANCE IN THE AUTUMN TERM

PAY COMMITTEE

Maintained Schools

- You **MUST** have a PAY COMMITTEE if you have adopted the LCC SCHOOL PAY Policy
- There is a proposed Terms of Reference for the PAY Committee in the policy
- The Pay Committee is constituted of 3 governors, but the CoG and Staff Governor should not be part of the committee
- The HT will present information to the committee on teacher pay and performance
- A member of the HT Performance Panel will present information to the committee on the HT pay and performance
- This is a delegated committee and the FGB do not ratify decisions but are informed in fact only after the committee have met at the next FGB meeting
- Further advice can be sought from HR advisor as required
- **PAY DECISIONS ARE NOT DISCUSSED AND AGREED AT FGB MEETINGS.**
- **Academies are free to set their own Pay and Conditions and Governance Professionals should refer to the academy policy for clarification.**
- **KEY DATES:**

Teacher Salary decisions must be dealt with by **31st October**

Headteacher Salary decisions must be dealt with by **31st December**

Governance Annual Survey Feedback

- Introduction of [governance briefing papers](#) covering key strategic themes/responsibilities.
- Increasing opportunities for governance modelling through the continued use of exemplar questions, practical scenarios and governance prompts within our training and briefing sessions.
- Improving the accessibility of Governor Partnership Briefings - timings of the afternoon session have been amended to an earlier start time.
- Continued signposting to the [Governor Services Professional Page](#) for key resources and [training offer](#).

LCC Updates

- 2026-27 LCC Child Protection and Safeguarding Policy is available.
- Behaviour Policy – please ensure that the behaviour policy includes clear measures to prevent bullying.

REMINDER:

Maintained Schools should have adopted the DfE Complaints Procedure and Policy for Managing Serial and Unreasonable Complaints. These can be found here:

[School complaints procedures: guidance for maintained schools - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/school-complaints-procedures-guidance-for-maintained-schools)

PLEASE ENSURE THAT THESE ARE AVAILABLE ON THE SCHOOL WEBSITE

Complaints advice is available from Governor Services and Legal Services

DfE Updates

- The DfE have updated their [Schools: statutory guidance page](#) – this outlines all the statutory guidance publications for schools and local authorities.
- UPDATED - [Maintained School Governance Guide](#)
- UPDATED – [Academy Trusts Governance Guide](#)
- [Academy Trust Handbook 2026](#)
- [Maximising value for pupils: guidance for schools and trusts - GOV.UK](#)
- [Academy trusts: findings from DfE's assurance work](#)
- [Information Sharing Duty](#) – statutory as from 30th September 2026
- [School Food in England](#) – as from 2027

Governor Services Training Offer

2026-27

- The [Governance Training Offer – Professional resources](#) is now available via the Governor Services web page.

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

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.

[Book tickets](#)

NEED HELP?

[Manage tickets](#)



NGA LEARNING LINK

- The Local Authority continues to purchase the NGA Learning Link online training programme for **MAINTAINED SCHOOLS ONLY**.
- There are over 60 modules which can be completed at your convenience.
- Registration details can be found on the [Governance Training Offer](#) web page.
- There are updated Safer Recruitment and Cyber Security Modules available this term
- Please ensure that your board is accessing all relevant training through the platform – use it or loose it!

FUTURE CLERKING EVENTS

CLERKS/GOVERNANCE PROFESSIONAL BRIEFINGS

- **SPRING TERM:** Wednesday 13th January 2027 – 10am
- **SUMMER TERM:** Wednesday 21st April 2027 – 10am

CLERKS/GOVERNANCE PROFESSIONAL TRAINING SESSIONS

- 30/09/2026 - Induction Training for Clerks (Maintained Schools)
- 06/10/2026 - Exclusions Training for Clerks and Governance Professionals
- 25/11/2026 - Complaints Training - Clerks (Maintained Schools)

FUTURE GOVERNANCE EVENT DATES

GOVERNOR PARTNERSHIP

- **AUTUMN TERM:**

04/11/26 - Governor Partnership Briefing

SEPTEMBER/OCTOBER GOVERNANCE TRAINING:

- **29/09/26** – SEND for Governors and Trustees
- **30/09/26** – An Introduction to EYFS
- **05/10/26** – SEND for Governors and Trustees
- **07/10/26** – Emotionally Based School Avoidance (EBSA)
- **07/10/26** – Governors Health & Safety Awareness
- **08/10/26** – Supporting the Education of CiC and PLAC
- **14/10/26** – Induction Training for New Governors (Maintained)
- **03/11/26** – Exclusion Training for Governors
- **09/11/26** – Safeguarding essentials for governors and trustees

Future Discussion/Forum Topics?

Thank you for attending.

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

