

The Great Big Governance Glossary 2026/27

SBW
Governance

Use of AI and Copyright Notice

Use of Artificial Intelligence

In preparing the 2026/27 edition of The Great Big Governance Glossary, AI tools (particularly The Key GTP) were used to support the drafting and editing process. Specifically:

- All AI-generated content has been reviewed, verified against authoritative sources, and adapted to ensure accuracy and relevance to the governance context
- The author takes full responsibility for all content, including any errors or omissions

The use of AI has enabled the creation of a more comprehensive and accessible resource while maintaining the author's voice and expertise. However, readers should always verify information against primary sources, particularly statutory guidance, and legal requirements.

Copyright and Usage

© Fee Stagg / SBW Governance 2026. All rights reserved.

You are welcome to:

- Download and share this Glossary within your school or trust
- Use it for training and development purposes
- Share it with other governors, trustees, and clerks via email or governance platforms
- Reference or quote from it in your own materials, provided you credit the source

You must:

- Acknowledge the source when referencing the Glossary publicly (cite as: "The Great Big Governance Glossary 2026/27, Fee Stagg, SBW Governance")
- Seek permission before including substantial extracts in published materials (contact: fiona@sbwgovernance.co.uk)
- Keep the document intact - please do not edit, amend, or remove attribution

You must not:

- Sell or charge for access to this Glossary
- Claim authorship or remove copyright notices
- Use it for commercial purposes without permission
- Substantially reproduce it in other publications without permission

Disclaimer

This Glossary is provided for information and guidance purposes only. While every effort has been made to ensure accuracy at the time of publication (September 2026), governance requirements and guidance change regularly. The views expressed are those of the author and should not be taken as legal advice.

Readers should:

- Always check current statutory guidance and regulations
- Consult with their clerk, Governance Professional, or appropriate advisor when in doubt
- Verify information against primary sources before making decisions

The author and SBW Governance accept no liability for any loss or damage arising from reliance on information contained in this Glossary.

Sources and Attribution

This Glossary draws on a wide range of publicly available sources, including:

- Department for Education statutory guidance
- Ofsted inspection frameworks and guidance
- Academy Trust Handbook
- Maintained Schools Governance Guide
- National Governance Association resources
- Confederation of School Trusts guidance
- Various educational research and policy documents

Specific thanks must go to the team behind The Key GTP; they have designed an algorithm with a sense of humour that reacts with emoji when it is told it is inaccurate! It made editing and proofreading the Glossary relatively straightforward, interactive, and great fun.

Thank you

CONTENTS

Welcome	Page 4
About SBW Governance	Page 5
How to use The Glossary	Page 5
A-Z list of definitions including page numbers (you'll need this list!)	Page 6
Introduction – setting the scene	Page 9
The A-Z – definitions, questions to ask, points to ponder, top tips and hyperlinks	Page 14
And finally	Page 161
Contact information	Page 162
A list of commonly used acronyms and abbreviations	Page 163
Sources of additional information and support	Page 167

Welcome to the 2026/27 Great Big Governance Glossary

Also known as The Encyclopaedia of Everything That Could Possibly Need to Know About Governance in Schools and Trusts; well almost everything...

How time flies!

Now you have read the disclaimer (which is new this year) a heartfelt thank you to everyone who downloaded previous versions of the Glossary – your support means a great deal. As before, this year's edition remains free to download and has been designed to be shared either as a PDF by email or via your governance platforms.

The editing process started in earnest at the end of 2025 summer term just as a plethora of Department for Education guidance was published and much has changed since the last Glossary. Last year I realised that I had missed some very important words and definitions, so I have included them in this version. The downside is that the Glossary is much longer than it was so I can't send you a printed copy due mostly to cost and the fact that if I did the hyperlinks would no longer work...

The Glossary is written for new governors, trustees, and clerks/Governance Professionals, but I hope it will also interest to those with years of governance experience. Its definitions and links are intended to help you navigate your governance role, offer a fresh perspective, and perhaps make you think in a different way about the all-important questions governors and trustee need to ask. A quick start guide to using the Glossary is also available.

For those new to their role the Glossary contains links to a wide range of documents, reports, and opinion pieces to help get you up to speed quickly so that you are not left thinking *what have I let myself in for...where's the door?* Please note that like most things in governance these days the Glossary is correct at the time of going to press, and the views expressed and top tips shared are those of the author alone. I have included documents and links that I have found useful or thought provoking myself.

The tone of the Glossary is, I hope, easily digestible and, at times, light-hearted. This is deliberate: governance matters, but sometimes we need space to pause, smile, and read something we can return to in manageable chunks. If you are in doubt about anything at any point when reading the Glossary, go first to the source material and then to your clerk or Governance Professional, Chair, Headteacher or CEO.

The Glossary refers throughout to governors, but please don't let that put you off if your role has a different title. The information applies equally to local governors in academy trusts — sometimes called Local Advisory Board members, Local Governing Board members or Academy Committee members — as well as trustees or directors, clerks, and Governance Professionals. Throughout the Glossary, *trust* and *academy trust* are used to refer to academy trusts, and *school* is used to mean both schools and academies, unless otherwise stated. The Glossary may also be useful for those who are new to school leadership and find themselves on a governing board for the first time.

Governors and trustees are increasingly being encouraged to take a much more deliberate approach to our own learning and development so whether you have downloaded a copy yourself or been given a copy by someone else thank you so much for reading it - I hope you find it useful. The errors are my own and I own them; be kind. Please remember - the questions suggested and top tips are a personal opinion and that **'what works somewhere will not work everywhere!'**

If you do share the Glossary in your networks – thank you. If you want to include a link to the Glossary in a publication please drop me an email fiona@sbwgovernance.co.uk. I will probably say yes but it's nice to be asked.

Fee Stagg - September 2026

About SBW Governance

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

SBW Governance is owned by Fee Stagg, who was a National Leader of Governance until August 2021. Fee has more than 20 years' experience as a governor, trustee, and clerk. She is currently Chair of Trustees in both the East and West Midlands, and also serves as a local governor and Member in other schools and trusts. Fee works as a Governance Professional across a number of schools, trusts, and Local Governing Boards in the north west and midlands areas.

Fee also designs and delivers bespoke governance training, undertakes External Reviews of Governance, and carries out governance health checks across the country. She is an occasional conference speaker and would be pleased to hear from you if she can help.

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

Author Note

Fee is very happy for you to share the Glossary with other governors, trustees, clerks and Governance Professionals across your boards and trusts. If you refer to it publicly, please credit SBW Governance. Thank you — it really is appreciated.

Please be aware that, as with all things linked to governance, some links may become out of date or stop working. If in doubt, go directly to the original source material. Please note that the Glossary is not an exhaustive one; there will inevitably be definitions, acronyms and abbreviations that have not made it in — acronyms, in particular, do seem to multiply when no one is looking!

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

Thank you for your continued support...

How to Use This Glossary

If you're new to governance: Start with the "Top 20 for New Governors" quick reference list

If you're looking for a specific term: Use the A-Z contents list or Ctrl+F to search

If you're preparing for a meeting: Look up key terms from your papers (e.g., Pupil Premium, SEND, Ofsted)

If you're doing a link visit: Check the relevant entries (e.g., Safeguarding, SEND, Pupil Voice)

If you're supporting a new governor: Share the "Top 20" and encourage them to dip in and out

Remember: This is a reference guide, not a novel. You don't need to read it cover-to-cover but there are additional definitions in the section called 'Not only but also...' so do read to the end!

A-Z List of Definitions in The Great Big Governance Glossary 2026/27

A is for (page 14) – Academy Trust – Accountability – Accountable Officer (academies only) – Acronym and Abbreviation – Action and Action Log – Admissions – Agenda – AGM (Academy Trusts) – Apologies (see also N is for No Show) – And – Annual Governance Statement – Articles of Association (AoA) – AI – Aspiration – Asset Register – Associate Members (maintained schools) – Assurance – Attendance – Audit – Autonomy B is for (page 25) – Balance – Belonging – Benchmarking – Bias – Blog – Board – Bothered – Boundaries – Bravery – Bucket – Budget	C is for (page 33) – Cadence – Candour – Capacity – Careers – CEO (academy trusts only) – Chair – Chair's Action – Chair's Power to Act – Challenge – Clerk – Climate Change – Code of Conduct – Cohort – Collaboration – Collective Responsibility – Committee – Communication – Competent – Complaint – Complaints Panel – Compliance – Confidentiality – Conflicts and Declarations of Interest – Context – Co-opted (both academies and maintained schools) – Covid-19 – Critical Success Factor – Culture – Cultural Capital – Curious – Curriculum – Cyber Security and digital standards	D is for (page 54) – Data – Data Protection – Dashboard – Deadline – Decision – De Facto Trustee – Delegate – Delegated Powers – Disaster Recovery Plan – Distributed Leadership – Diversity – Due Diligence – Duplication – Dysfunctional E is for (page 62) – Early Help – Effectiveness – Elective Home Education – Enrichment Benchmarks (June 2026) – Equality and Equity – Estates – Ethical Leadership – Ethos – Evidence – Exclusion – now referred to as school suspensions and permanent exclusions – External Review – Extra-Curricular
F is for (page 70) – Feedback – Federation – Finance – Fit and Proper Person – Fluency – Forest Schools – Foundation Governor – Freedom of Information (FOI) and Subject Access Requests (SARs) – Funding Agreement	G is for (page 75) – GAG Pooling – GDPR – Get Information About Schools (GIAS) – Gifts and Hospitality – (Own) Goal – Going Concern – Governance Professional – Governor – Groupthink – G is not for Guess	H is for (page 83) – Headteacher (or CEO) Performance Appraisal/Management – Headteacher's Report (and CEO Report) – Health and Safety – Happy – HR (Human Resources)

– Further Education –		
I is for (page 91) – ICFP – IEB – Impact – Implementation – Inclusion – Influence – Impact and Implementation – Information Governance – Induction – Innovate – Instrument of Government	J is for (page 99) – Joy – Just – Justice K is for (page 100) – KCSiE – Key Line of Inquiry – Key Performance Indicator – Key Stage – Kindness – Knowing Your School	L is for (page 103) – Late Papers (impact of) – Leadership – Link Governor – Local Governing Body/Board (LGB) – academies only – Lone Working – Looked After Children (LAC)
M is for (page 110) – Maintained School – Managed Move – Master Funding Agreement – Members – Meetings – Members (see also AGM) – Micromanaging – Minutes – Monitoring	N is for (page 115) – National – Networking – Noise (Making Some) – Nobody (N is NOT for Nobody) – No-show	O is for (page 117) – Obvious – Off Rolling – Ofsted – One of Those Days – Openness – Outlier – Oversight – Outcomes –
P is for (page 122) – Pay – Pecuniary and Business Interests – Performance Management and Appraisal – Period Poverty – Persistent Absence – Phishing – Policy – politics with a small p – Poverty Proofing – Professional – Prevent – Proportionality – Primary – Psychological Safety – Pupil Premium – Pupil Voice – Purpose	Q is for (page 131) – Questions – Quiet – Quorate R is for (page 134) – Records Management – References – Relationships – Related Party Transactions – Reliable – Remuneration – Research – Resignation – Resilience – RISE – Risk – Risk Register	S is for (page 139) – Safeguarding – Scheme of Delegation (academy trusts) – School Business Manager/School Business Leader/Bursar – School Council – School Financial Value Standard (maintained schools only) – SOAP – Scrutiny – Self-Reflection – Single Central Record – Skills and Knowledge Audits – Social Media – Special Schools – Spelling Mistakes – Staffing – Stakeholder – Standing Items and Orders – Strategic – Subsidiarity

		– Succession Planning
T is for (page 148) – Training and CPD – Trustee – Types of Governor – Type of School U is for (page 150) – Understanding – Underestimate – Unilateral (U is not for Unilateral) – Unusual – Update – Urgent	V is for (page 153) – Vice Chair – Vision and Value(s) – Visits – Volunteer W is for (page 156) – Website – "We" not "I" – Wellbeing and Mental Health – Whataboutery – Whistleblowing – Workload	X is for (page 158) – No eXcuses Y is for – You Z is for – Zero Not only but also... (page 159) – A is for Allergy – F is for Flourish – F is for Food Standards

Introduction – Setting the Scene

Dear Reader,

Are you sitting comfortably? Pull up a chair, put your feet up, pop the kettle on (or on again if you have read the Glossary before) and we'll begin...



Picture this. It is just before your first meeting and you have eagerly read all the documents, filled in all the forms (there seem to be more than ever) and have done some training and are ready rock and roll. Unfortunately, you are still none the wiser. Oh, Dear Reader, this happens far too often but fear not, help is at hand...

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

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

So, what is Governance?

Good question. It used to be quite simple when The Governance Handbook provided a comprehensive overview of governance principles applicable to all types of schools, including both academies and maintained schools. The governance statements in the Academy Governance Guide 2026 and the Maintained Schools Governance Guide 2026 now have specific 'purposes' tailored to the contexts of academies and maintained schools, respectively.

The key differences between the two sets of guidance are around

- Context specific guidance
- Regulatory foci
- Strategic and operational emphasis
- Accountability and improvement

It is therefore important to understand the setting in which you govern and the governance layer at which you sit.

The Core Functions of Governance

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

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

The core functions of governance are focused around:

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

What's Your Setting?

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

Listed below are some key documents that are the backbone of good governance. However, many of the documents are quite long so do not print them out however they are all free to download¹ and any hyperlinks that have been included in The Glossary will take you straight to the relevant website. Fingers crossed! Of first and foremost importance are The Maintained School Governance Guidance (March 2024), Academy Governance Guidance (July 2026), Academy Trust Handbook (July 2026; effective from October 2026), Keeping Children Safe in Education (effective September 2026). When the Governance Guidance documents are updated the hyperlink will automatically update. The Governance Handbooks together with the latest safeguarding policies, which are discussed later in the Glossary, are your governance cornerstones.

Of particular interest to clerks are the [primary legislation](#) and the [guidance](#) on the constitution of the governing board. In the past governors used to be given a document called 'The Governors Guide to the Law.' It used to be published on a CD and before that in a printed folder. How times change!

In terms of Ofsted the inspection framework can be found at [Education inspection framework \(EIF\)](#) and most boards will (should in fact) undertake some Ofsted related governor training. Having an understanding of the requirements of an Ofsted inspection is important but it should not be the sole driver of our governance activities. You can find useful questions to ask here [FAQ here](#). Discuss!

[Understanding your data: a guide for school governors and academy trustees](#). This document, although it is a few years old now, sets out 7 themes bringing together a range of information to help boards analyse, discuss, and challenge the educational and financial performance of their school or academy trust. There is also some [guidance](#) published by the Educational Endowment Foundation which is free to download. The EEF guide to '*becoming an evidence-informed school governor and trustee*' is designed to offer a quick way into the evidence the EEF make freely available to all schools. If you have some spare time why not have a look?

You also need to be aware of [The Seven Principles of Public Life](#) (also known as the Nolan Principles) – more of which later as they underpin our governance behaviours.

Safeguarding essentials - you **must** be familiar with the contents of [Keeping Children Safe in Education](#) and sign to confirm that they have read and are familiar with the contents and requirements of the document. It is important everyone understands how safeguarding, for everyone not just the pupils, works and why it is so important. KCSIE gets updated regularly. You will receive training via your school or academy trust and you must complete this as soon as possible. Some schools and trusts include undertaking safeguarding training as a requirement of their code of conduct compliance checks.

If you are a trustee, governor, or clerk in an academy (i.e. not a maintained school under Local Authority control) these documents will also be of interest:

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

- The [Academy trust handbook 2026](#): (which is effective from 1st October 2026) is updated at least annually and usefully includes a list of what has been updated. If you have time it might be worth having a look at some of the hyperlinked documents as these are really useful. Trustees must read, understand, and abide by the contents of the Handbook and it is a good idea if this approval is minuted. In addition, Trustees may find the [Academy Trust Governance Code](#) and [Trust Quality Descriptions](#) of interest. These are still not statutory but are of increasing prominence. Please note: The DfE have announced in the ATH 2026 that they are considering publishing new trust standards.
- Meeting agendas must always include items on compliance such as the risk register and policies.
- Your academy trust's Articles of Association (AoA), which should also be published on the academy website. These are the guiding principles and although they are not an everyday read they are extremely important. There are a range of [model articles of association](#) available on the DfE website. Church based trusts have different [model documents](#) *with the purpose of supporting in the Church of England for example Dioceses and Trustees with respect of their duty to ensure the effective (not merely nominal) continuance of the Church of England character of the Academy/ Academies, thus enabling the Trustees to show that they continue to carry out their trust and are providing their land for that purpose.* There are also articles of association for Catholic trusts, a range of supplemental funding agreement models and other key documents. The DfE stresses that *while the model articles are broadly similar, there are differences in the way the governance arrangements at membership and governing body level have been reflected.*
- If you govern in a trust in any capacity the Scheme of Delegation is crucially important and whilst they are different for every trust they cover similar activities. The Scheme should also be published on the trust's website and at their simplest are accountability matrices outlining who can take what decision at which level in the organisation. These will be supported by Terms of Reference for the various committees. Your trust may also have 'standing orders' which are a list of the internal procedures used to ensure compliance with governance requirements. If you are thinking of joining an academy trust, reading, and understanding the Scheme of Delegation is a key task for the board.
- The Confederation of School Trusts (a membership organisation) has also published some governance guidance for Trustees – it is well worth a read as it contains lots of questions for boards to ask as well as hyperlinks to documents, research and think pieces. It is free to download - [Governing a school trust](#).

Governing in a Church School

If you are governing in a church school you will also need to follow advice and guidance from your relevant Diocese. Your chair and clerk will be able to point you in the right direction. Some Diocesan Boards of Education run Welcome to Governing in a Church School training, so these are worth checking out. (Do not book on anything unless it is free, you are willing to pay for yourself or have express permission to book from the school. Budgets are tight).

If you are governing in a church school you should also have been given copies of the last SIAMS or CSI² reports and someone should take you through what this means to you as a governor. It is especially important to understand what your specific role is in inspections if you are a Foundation or Church Governor.

Thinking of joining an academy trust?

If you are a governor in a maintained school and thinking of joining or forming a Multi-Academy Trust all of the above documents are worth looking at as you plan your decisions. There is lots of advice on the questions to ask about academisation and there is much thinking to do if your school is thinking of joining a trust available free on the internet. The National Governance Association and the Confederation of School Trusts have some excellent advice (free to download; see above) and one of the best places to start can be found in this [document](#). The report has been designed to help school leaders, trustees and governors better understand the current policy landscape, to consider their options, and to make the best long-term decision for their school. Why not ask another school who has joined the Trust what their ‘journey’ was like and if there are any questions they wished they had asked! The academisation journey may have slowed a little but schools are still joining academies and so it is worth thinking about if it is the right thing for your school to do.

Things do change so always seek external advice and support before making any decisions. You may like to contact other schools and local governing boards in the Trust and ask to meet them. Most will be really welcoming. IGovS is a good place to start as they can offer impartial advice.

Ofsted

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

DfE

The DfE have published its key strategy [Giving every child the best start in life](#). *The opening sentence states The foundations of the stronger society this government wants to build must be laid down from the very start of children’s lives.* If you have a chance it might be worth a read. At the time of writing a new Education Secretary had been appointed and policy directions may change. Keeping abreast of DfE publications is not always easy but your school, trust or clerk should help you.

Your First Meeting

Before your first meeting you should receive a meeting pack — usually by email or via a governance information-sharing platform. This should include, or link to, recent minutes, reports from school leaders, pupil outcome data, budgetary and financial information, and possibly a collection of other documents such as policies, some of which are statutory. It is also well worth reading the school’s latest Ofsted inspection report or monitoring letter, as this will give you useful context. There may be up to 20 attachments in the pack — and yes, that is just for one meeting. Good luck with that! No, seriously, this is exactly where the Glossary comes in: to help you make sense of the terminology, understand what matters, and give you a few things to think about as you go along.

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

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

² These terms are explained later in the document.

In Summary

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

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

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

Starting your governance journey?

Tips for new governors and trustees

This Glossary is a long document and contains over 200 definitions and explanations, as someone new to governance you may find these top 20 entries are a good place to start:

1. **A is for Accountability** (core function)
2. **C is for Challenge** (what it means)
3. **C is for Clerk** (who they are and what they do)
4. **C is for Code of Conduct** (Nolan Principles)
5. **C is for Confidentiality** (what you can and can't share)
6. **D is for Data** (how to interpret it)
7. **F is for Finance** (budget basics)
8. **G is for Governor** (understanding the role)
9. **I is for Inclusion** (especially with the White Paper changes)
10. **K is for Knowing Your School** (context)
11. **M is for Meetings** (what to expect)
12. **O is for Ofsted** (what to expect)
13. **P is for Pupil Premium** (key funding)
14. **Q is for Questions** (how to ask them)
15. **S is for Safeguarding** (KCSIE)
16. **S is for Strategic** (vs operational)
17. **T is for Training** (your development)
18. **V is for Visits** (link governor visits)
19. **W is for Wellbeing** (yours and others')
20. **Y is for You** (your voice matters)

Tips for new clerks

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

Good luck!

An A-Z of Governance

This A-Z explores some of the words, phrases and behaviours you're most likely to come across in the world of governance.

This year, I've widened the lens a little. Not every entry is a governance definition — the Glossary includes a broader range of governance behaviours, ideas and perspectives. You may want to add your own definitions, disagree with some of the angles or viewpoints, or perhaps have a “yes!” moment when something strikes a chord and the light bulb comes on.

You'll also find hyperlinks to organisations that provide support, guidance and information for schools and academies. This is by no means a definitive list, but I hope you'll find it a useful starting point for further exploration.

Threaded throughout the Glossary are Top Tips and questions to ask, prompts to help you reflect, challenge, and perhaps spark a useful conversation around the board table but perhaps The Most Important Question to ask is...

How do we know?

This is the most important question in governance. It's the question that sits behind every decision, every challenge, and every assurance the board seeks. At their most strategic four key How Do We Know questions are: keep them close:

1. How do we know all pupils feel safe and included?
2. How do we know our strategic priorities are being implemented effectively?
3. How do we know our curriculum is having the intended impact?
4. How do we know our spending is delivering value for money?

Good governance is evidence-based. It doesn't rely on assumptions, anecdotes, or what “feels right.” It asks for data, for triangulation, for proof. Throughout this Glossary, you'll see “How do we know?” referenced again and again – because it's the question that keeps governance strategic, curious, and accountable.

I hope you find the Glossary useful, entertaining, thought-provoking and, most importantly, something you'll want to dip into from time to time.

A is for Academy Trust

An academy trust is an organisation that operates one or more academies. It is a legal entity, a charitable company and a key part of the governance architecture of the schools it oversees.

But perhaps the most useful thing to understand is that an Academy Trust is not simply the organisation “above” the school. It is the legal and governance framework through which responsibility, accountability

Some academy trusts have only one school - these are called Single Academy Trusts (SATs), not Multi-Academy Trusts, though they operate under the same legal and governance structure. There are still a few empty MATs around but these are less common than they were.

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

A is for Accountability

Accountability is one of the words you'll hear a lot when you're governing — and for good reason. It's the backbone of effective governance and should be a two-way process: governors hold leaders to account, and governors themselves are accountable to pupils, parents, Ofsted, the DfE, and the wider community.

What you think or feel about the word “accountable” often depends on whether you're the one being held to account or doing the holding to account. But here's the thing: accountability isn't about blame or catching people out. It's about clarity, transparency, and ensuring that everyone — leaders, governors, and trustees — can explain and justify their decisions, actions, and outcomes.

Who is accountable to whom?

In a maintained school:

The governing board is the school's legally accountable body. The board is accountable for the school's performance to:

- The Local Authority (LA)
- The diocese or appropriate religious body (if relevant)
- Ofsted
- Pupils, parents, and the wider school community
-

In an academy trust

The trust board and the Accountable Officer (usually the CEO) are responsible for the trust and its schools. They are accountable to:

- The Secretary of State for Education (via the DfE's Regional Directors)
- Ofsted
- Members (at the AGM)
- Pupils, parents, and the wider school community

The name of the Accountable Officer must be published on the trust's website. For understandable reasons, this is usually the highest paid person in the trust. (See also A is for Accountable Officer.)

What does accountability look like in practice?

Accountability means:

- Being clear about who is responsible for what — and making sure everyone knows it
- Asking the right questions — not just accepting what you're told at face value (See also C is for Challenge, Q is for Questions, H is for "How do we know?")
- Seeking evidence — using data, reports, visits, and pupil/staff voice to verify what you're being told
- Making informed decisions — based on evidence, not assumption
- Being able to explain and justify decisions — to Ofsted, parents, the LA, the DfE, and each other
- Taking responsibility when things go wrong — and learning from mistakes

Accountability is not about micromanaging or blaming leaders when things are difficult. It's about clarity, transparency, and shared responsibility for improving outcomes for children.

Questions to ask about accountability:

1. What does accountability mean to us? Have we ever discussed this as a board?
2. Are we staying true to our values, culture, and ethos? How do we know?
3. Are we making sufficient progress towards our vision, strategy, and development plan? What's the evidence?
4. Do we fully understand our current challenges? Are we asking the right questions?
5. What could we have done better? Are we reflecting on our own effectiveness as a board?
6. How do we know? This is the most important question of all. (See also H is for "How do we know?")

Top Tip

An Ofsted inspector or external governance reviewer will not be impressed if you tell them you know something *"because the headteacher told us."* Governors must seek evidence for themselves — through data, visits, reports, pupil voice, and triangulation. Trust, yes. But also verify.

Why accountability matters:

- It drives improvement. When leaders know they will be held to account, they stay focused on outcomes and impact.
- It builds trust. Transparent, evidence-based accountability reassures parents, staff, and the community that the school is well-led.
- It protects children. Accountability ensures that decisions are made in the best interests of pupils, and that risks are identified and addressed.
- It's the law. Governors and trustees have legal duties to hold leaders to account and to be accountable themselves.

Accountable means being legally and morally responsible for decisions, actions, and outcomes — and being able to explain and justify them to stakeholders and regulators. This is why your meeting minutes are so important. They are the record of your decisions, your challenge, and your accountability. (See also M is for Minutes.)

Accountability is not a burden. It's a responsibility — and when done well, it's one of the most powerful tools for driving improvement and protecting children.

See also: A is for Accountable Officer, C is for Challenge, Q is for Questions, H is for "How do we know?", E is for Evidence, M is for Minutes, G is for Governance

A is for Accountable Officer (academies only)

The Accounting Officer role includes specific responsibilities for financial matters. It includes a personal responsibility to Parliament, and to ESFA's own accounting officer, for the trust's financial resources. You can find more information about this important role in the Academy Trust Handbook. There some³ [guidance on the role of the accounting officer](#) published by the Confederation of School Trusts which sets out the key roles and responsibilities of the AO. The guidance states *the accounting officer must complete and sign a statement on regularity, propriety, and compliance each year and submit this to ESFA with the audited accounts. The Accounting Officer must also demonstrate how the trust has secured value for money via the governance statement in the audited accounts.*

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

A is for Acronym and Abbreviation

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

A is for Action and Action Log

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

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

³ This may only be accessible to CST members.

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

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

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

Some things to ponder...

1. if all the actions identified on an action log are for school leaders is this governance or management? governance should focus on strategic oversight, setting direction, and holding leaders to account, not carrying out operational tasks.
2. if all the actions are for the clerk or Governance Professional are they in danger of becoming a de facto governor or trustee?
3. if all actions identified are for the chair is this effective governance?
4. if there are too many actions that are ongoing this can be a bit of a worry. Why do you think that is? What do you think you can do about it?

Top Tip

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

A is for Admissions

Admission criteria are different for each school so it is wise to check and all schools **must** approve an Admissions Policy each year; with the majority of schools and trusts adopting the Local Authority policy. Some trusts and Voluntary Aided schools are also their own admissions authority. DfE guidance and criteria can be found [here](#). You may also be interested in the [School admissions code](#). Where changes are proposed to admission arrangements, the admission authority must first publicly consult on those arrangements⁷. If no changes are made to admission arrangements, they must be consulted on at least once every 7 years

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

- Are in care or being looked after,
- Have been in care.

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

A is for Agenda

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

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

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

Key features of a good agenda include:

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

A is for AGM (Academy Trusts)

It is important that members do not undertake the trustees' role.

All Academy Trusts must hold an Annual General Meeting in one form or another. The Academy Trust Handbook 2026 states that AGMs

- provide an opportunity for members and trustees to come together at least once a year
- help ensure that members are kept informed about the actions and decisions of the board, supporting the accountability of the trustees
- give a formal opportunity for members to exercise their legal duties and powers in overseeing trust governance, for example, routine appointments to the board

Trustees are welcome to attend the AGM but unless otherwise invited it is not usual for local governors to attend. AGMs are not usually long meetings and have the following key purposes – approval of the annual accounts and financial statements, formally appoint the external auditors on the recommendation of the trust board, hold the trustees to account in ensuring governance and integrity is effective, and the appointment or reappointment of trustees and members.

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

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

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

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

It is really important that if you know in advance that you cannot attend a governors' meeting that you submit your apologies (usually to the clerk). If you do not submit apologies for 6 consecutive months you may well find yourself suspended from the board. If you have a personal reason (such as ill health) which means you cannot attend the meetings please let the clerk know – you do not have to share personal details but it is good that the other governors know you are not able to be there. Sometimes a virtual link to the meeting can be provided so you can still attend. It is not usual for the reason for your non-attendance at the meeting to be written in the minutes and confidentiality should always be respected. Remember that attendance at governing meetings is published on the school website.

If you need help with child care costs – please ask for a copy of the Governor or Trustee Expenses Policy – no one should be additionally out of pocket because they are volunteering.

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

A is for And

And is a very small but powerful word. By asking and? more often we can have deeper and more wide ranging conversations. Why not think about asking '*and then what happened/do you expect to happen/difference you want to make?*'

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

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

A is for Annual Governance Statement

For Academy Trusts:

The Annual Governance Statement (AGS) is a required part of the annual accounts that academy trusts must submit to the Department for Education. The Accounting Officer must complete and sign a statement on regularity, propriety, and compliance each year and submit this to DfE with the audited accounts. The Accounting Officer must also demonstrate how the trust has secured value for money via the governance statement in the audited accounts.

In academies, the Annual Governance Statement is:

- Mandatory (it's part of the audited accounts)
- Prepared by the Accounting Officer (usually the CEO)
- Submitted to the ESFA alongside the annual accounts
- Focused on governance, risk management, and internal control

The AGS is different from the Trust Annual Report, which is a broader document covering the trust's activities, achievements, and financial performance over the year.

For Maintained Schools:

There is no statutory requirement for maintained schools to produce an Annual Governance Statement' in the same formal way that academy trusts must. However, it's excellent practice for maintained school governing boards to produce something similar – an annual reflection or statement that covers:

- What the board has achieved over the year
- How governance has been effective (or where it needs to improve)
- Key decisions made
- Training undertaken
- Governor attendance and engagement
- Compliance with statutory duties
- Plans for the year ahead

You could perhaps discuss this at the end of each meeting as a quick way to collect that all important evidence.

Whilst preparing an annual impact or governance statement is not a legal requirement, it is a really smart governance move because it:

- Demonstrates accountability
- Shows transparency
- Helps the board reflect on its own effectiveness
- Provides a record for future governors
- Can be shared with Ofsted or used in an External Review of Governance

A is for Articles of Association

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

Top Tip for Clerks

Check the AoA in terms of the appointing body for Trustees – these are usually either Member appointed or co-opted but in trusts without a local layer of governance or in Single Academy Trusts there are parent trustees and in Church trusts foundation trustees appointed by the Diocese.

A is for AI

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

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

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

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

A is for Aspiration

Aspiration is about believing in what's possible for every child, regardless of their background, needs, or starting point. It means setting high expectations, refusing to accept limits based on disadvantage or circumstance, and creating a culture where all pupils are supported to reach their full potential — academically, personally, and beyond. Aspiration isn't just about academic results; it's about broadening horizons, opening doors, and ensuring every child has access to enriching experiences, high-quality teaching, and genuine opportunities. The government's strategy, *Giving every child the best start in life*, is built on this principle — and as governors and trustees, your role is to ensure aspiration is lived and embedded in the curriculum, culture, and decisions, not just written on a website.

Aspiration should be visible in the questions you ask, the data you scrutinise, and the voices you listen to — especially those of the pupils themselves.

Questions to ask:

1. Do we have genuinely high aspirations for all pupils — including those with SEND, disadvantaged pupils, and other vulnerable groups? How do we know? What's the evidence?
2. What opportunities for enrichment, trips, careers education, and life experiences do we offer, and are they accessible to all pupils? Are we removing barriers or accepting them?
3. What does pupil voice tell us about aspiration? Do pupils believe they can succeed? Do they have high expectations for themselves and their futures?

See also: C is for Careers, C is for Cultural Capital, C is for Curriculum, E is for Enrichment, E is for Equality, I is for Inclusion, P is for Pupil Premium

A is for Asset Register

The asset register is a record of all the valuable items owned by the school or trust (e.g., IT equipment, furniture, vehicles, land, and buildings), used to track, manage, and safeguard assets and to support financial accountability and insurance claims.

The completion of the asset register itself is not the role of governors or trustees, but they must check that the asset register has been completed and is up to date. Sometimes approval is required to dispose of an asset, depending on its value. An asset register is a key tool for managing school assets effectively and supporting accurate financial reporting and accounting. Without one, schools may struggle to monitor what assets they have, where they are located, and what condition they are in.

Managing the asset register is an operational matter — not one for governors to get involved with on a day-to-day basis.

Academies must also complete the Land and Buildings Collection Tool (LBCT) annually, which provides the DfE with detailed information specifically about the trust's land and buildings to support capital planning and oversight. This data should align with what's recorded in the asset register. Again, this is not the job of trustees to complete — but they should ensure it has been done.

A is for Associate Members (maintained schools)

Associate Members (AMs) are not governors. Repeat after me: Associate Members are not governors!

Associate Members are people appointed to the governing board for a specific length of time (usually 12 months) to play a particular role or contribute specific knowledge, skills, or expertise. Their appointment must be minuted.

What Associate Members can and can't do

They can:

- Attend Full Governing Board (FGB) meetings
- Vote on committees (but only if the governing board agrees and this is minuted)

- Contribute their expertise and support the board's work

They cannot:

- Vote at the FGB (unless this is explicitly given and minuted — which is rare)
- Chair the FGB
- Count towards the quorum
- Attend any part of a meeting that concerns confidential staff or pupil matters (they may be excluded)

Other key points

- Like governors, AMs must be over 18
- Their details must be listed on the school website, but (as yet) they do not need to be published on Get Information About Schools (GIAS)
- AMs should undertake any safeguarding training required of them, just like governors
- Often, staff such as the School Business Manager are appointed as Associate Members — but this isn't strictly necessary, as they should be attending and/or reporting to board meetings as a matter of course anyway

What about academies?

Some academy trusts allow Associate Members (or similar roles), but approval is usually required and the role may be defined differently. Check your Articles of Association and Scheme of Delegation.

See also: A is for Articles of Association, S is for Scheme of Delegation,

Why have Associate Members?

Associate Members can bring valuable expertise to the board — for example, in finance, HR, safeguarding, or a specific area of school improvement. Being an Associate Member is very rewarding, and many go on to become full governors.

Top Tip

If you're appointing an Associate Member, be clear about why you're doing it, what role they'll play, and for how long. Make sure their appointment, role, and any voting rights are clearly minuted. And don't forget to review their contribution regularly — are they adding value, or should they transition to a full governor role?

See also: C is for Co-opted, G is for Governor, T is for Types of Governor, S is for Scheme of Delegation (for academies)

Top Tips for Clerks

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

A is for Assurance

Assurance sits alongside accountability as one of the twin pillars of effective governance. While accountability is about holding leaders to account for decisions and outcomes, assurance is about gaining confidence that the right systems, processes, and controls are in place — and that they are working as intended.

In governance terms, assurance means:

- Checking that things are being done properly – not doing them yourself but satisfying yourself that they are being done
- Seeking evidence – not just accepting what you are told, but asking "how do we know?" and "what's the evidence?"
- Triangulating information – using multiple sources (data, visits, staff voice, pupil voice, external reports) to build a complete picture
- Monitoring compliance – ensuring the school or trust is meeting its statutory, regulatory, and contractual obligations (e.g., safeguarding, finance, health, and safety)
- Testing assumptions – asking "what if?" and "what could go wrong?" to understand risk and resilience

Assurance is not about micromanaging or second-guessing leaders. It's about creating the conditions for trust — but verifying that trust is well-placed.

Why assurance matters

Without assurance, boards can fall into the trap of:

- Passive governance – accepting reports at face value without probing or testing.
- Blind spots – missing risks because no one asked the awkward questions.
- Over-reliance on individuals – assuming that because the headteacher or CEO is capable, everything must be fine.

Assurance in practice

Boards gain assurance through:

- Regular reporting – clear, evidence-based reports on key areas (safeguarding, finance, pupil outcomes, risk).
- Governance visits – seeing the school in action and talking to staff and pupils.
- Internal and external audits – independent checks on systems and compliance.
- Triangulation – comparing what you are told with what you see, hear, and read.
- Asking the right questions – "How do we know this is working?" "What would we see if it wasn't?" "Who else has checked?"

Assurance vs. Accountability

Assurance	Accountability
Are the right things being done?	Are leaders delivering on their responsibilities?
Are systems and controls working?	Are outcomes improving?
How do we know?	What will you do about it?
Confidence and trust	Challenge and scrutiny

Remember: both activities are essential. Assurance builds the foundation of trust; accountability ensures that trust is earned.

Top Tip

If your board spends all its time holding leaders to account but never seeks assurance that the right systems are in place, you may be missing the bigger picture. Balance is everything!

A is for Attendance

All children and young people should have the opportunity to be included, fully engaged and involved in their learning and to participate fully in the life of their school. Governors and trustees should regularly ask for data and updates on pupil and staff attendance, persistent absence, and holidays in term time. Ofsted will most

certainly ask questions if your school has data below the national average. Trustees should be presented with trust-wide data.

Understanding the Register

Sometimes the school register is audited, and it's good for governors to ensure that the register is compliant and all the correct absence codes have been used by asking if and when an external audit has taken place. Mistakes can be made, but if these are deliberate or regularly in error, you need to know. There are a variety of absence codes used by schools on the attendance register – having an awareness of these is useful, but you don't need to know the detail. **Please also** read O is for Off-rolling.

Key Guidance and Fines

'Working together to improve school attendance' is guidance that sets out the roles and responsibilities of schools, academy trusts, governing bodies, and local authorities in maintaining high levels of school attendance. Attendance: template report to governors This guidance is expected to be updated.

From August 2024, the fine for school absences across the country is £80 if paid within 21 days, or £160 if paid within 28 days. Governing boards may well see an increase in parental complaints relating to this increase – if a parent approaches you, tell them to contact the school. You cannot get involved, whatever your personal views. This is not always easy. Most schools have issued letters to parents explaining the fines and how these will operate.

Data Tools and Dashboards

The DfE now publishes termly attendance summary reports that school and trust leaders can access through the 'monitor your school attendance' service, which requires a DfE sign-in. It's best practice for school and trust leaders to share these reports with governors. Attendance: template report to governors These reports are extremely useful and include:

- Headline data on overall attendance and persistent absence compared with the national average
- Weekly attendance levels tracked against the national average
- Comparison of attendance for different pupil groups (e.g. pupils with SEN and pupils eligible for FSM)
- A table showing the number of pupils in each 5% band of absence severity

School leaders also have access to the 'View Your Education Data' (VYED) service, which includes a visual heatmap called 'Explore your attendance patterns' displaying attendance information across the year. Governors and trustees do not have direct access to VYED as it uses pupils' names taken from the daily register of attendance. However, an anonymised dashboard can and should be shared with the board to generate insights and questions.

New Attendance Baseline Improvement Expectation (ABIE)

From the 2026/27 academic year, the government is introducing an Attendance Baseline Improvement Expectation (ABIE) – a minimum attendance expectation that each school will be expected to meet. Schools received an indicative ABIE on 12 November 2025, showing what the minimum attendance expectation would have been for the 2025/26 academic year.

National Attendance Data

For 2024/25, the national data shows:

- Primary schools: 5.2% overall absence, 1.5% unauthorised absence
- Secondary schools: 8.4% overall absence, 3.2% unauthorised absence
- Special schools: 12.8% overall absence, 3.4% unauthorised absence
- All schools: 6.8% overall absence, 2.3% unauthorised absence Attendance: national, LA, and school data

Exclusions Guidance (see also E is for Exclusion)

The suspension and permanent exclusion guidance is the latest guidance on this important aspect of attendance, although there are rumours it will be updated. If you are asked to sit on a panel, please ensure that you have read the guidance. You should receive some training prior to sitting on a panel as these are not necessarily straightforward. As a first port of call, read through the guidance to understand what the responsibilities of governors are.

Questions governors could ask about attendance

1. Do our policies and practices promote and explicitly value good attendance (with pupils, parents, and partners)?
2. Is our approach to promoting attendance inclusive and addressing equity issues?
3. How can partnership working with parents, community and family learning, and other partners be developed further to increase attendance and manage absence?
4. Do the pupils understand the impact of not attending school, particularly for those who travel to school by themselves?
5. Have we analysed and reported on attendance data in a way that means our school's governors can take action effectively and in a timely manner? Analysing your attendance and absence data

Important Reminder: Attendance at school can be a complex issue, so do read around the documentation before challenging information presented to you. It's extremely important that you don't get mixed up between "must" and "should" – these terms have very specific and different meanings with legal consequences.

A is for Audit

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

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

Remember: audits are not just financial and can be commissioned at any point in the academic year.

Academy Trust Audits

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

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

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

A is for Autonomy

Governors and Trustees do not have the right to make decisions outside of the school or trust's governing documents; terms of reference or policies. Trustees and governors are guardians of public accountability,

not 'free agents.' The strength of a board lies in oversight, not operational control. True effectiveness comes not from autonomy, but from assurance, challenge, and clarity of roles.

B is for Balance

Governance is all about balance. Balance between challenge and support. Balance between strategic oversight and operational detail. Balance between compliance and improvement. And balance in your own life — because effective governance shouldn't come at the cost of your wellbeing.

Finding the right balance:

- Challenge and support. Your job is to hold leaders to account and support them. Too much challenge without support can feel adversarial. Too much support without challenge can lead to complacency. The best governance strikes the right balance.
- Strategic and operational. Governors should focus on the big picture — vision, strategy, outcomes, risk. But you also need to understand enough of the operational detail to ask informed questions. It's a balancing act. (See also S is for Strategic and O is for Oversight.)
- Compliance and improvement. Yes, you need to tick the boxes — policies approved, safeguarding checks done, website up to date. But governance is about more than compliance. It's about driving improvement, asking "so what?", and making a difference. Don't let compliance crowd out the strategic work.
- Urgency and reflection. Some decisions need to be made quickly. But good governance also requires time to think, reflect, and consider different perspectives. Don't rush important decisions just because the agenda is full.
- Your own wellbeing. Governance is rewarding, but it can also be demanding. Make sure you're looking after yourself. If you're struggling, speak to the chair, vice chair, or clerk. You're not alone.

Questions to ask:

1. Are we striking the right balance between challenge and support in our relationship with school leaders?
2. Are we spending too much time on operational detail and not enough on strategy?
3. Are we governing for compliance, or are we driving improvement?
4. Do we give ourselves enough time to reflect and think, or are we always rushing?
5. Am I finding the right balance in my own life?

Top Tip

At the end of your next meeting, ask: "*Did we get the balance right today?*" It's a simple but powerful reflection that can help you stay focused on what matters.

See also: I is for C is for Culture, S is for Safeguarding, E is for Equality

B is Belonging

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

To feel a sense of belonging is to feel accepted, to feel seen and to feel included by a group of people, believing that we fit in, trusting we will be protected by them. To not feel belonging is to experience the precarious and insecure sense of an outsider⁴.

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

⁴ Leora Crudas CBE – Chief Executive; Confederation of School Trusts [Conference speech 2024](#)

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

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

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

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

Some suggested questions about belonging...

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

These are questions perhaps all boards should be asking!?

B is for Benchmarking

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

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

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

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

These are some benchmarks⁵ offered by a well-known AI platform (well, why not!?) – what do you think about the targets? Useful?

Action	Benchmark	Why It Matters
Board Meeting Efficiency	Meetings should start and end on time, with at least 90% of the agenda covered within the allocated time.	Efficient meetings reflect good planning and time management, ensuring that the board is focused and productive. This benchmark also indicates that

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

		the board is effectively prioritising its discussions and decisions.
Board Member Attendance and Participation	At least 95% attendance rate at board meetings, with active participation from all members.	High attendance and participation rates demonstrate commitment and engagement from board members, which is essential for informed decision-making and accountability.
Strategic Plan Alignment and Progress	80% or more of strategic plan objectives should be on track or achieved within the designated timeframe.	This benchmark ensures that the board is effectively guiding the organisation towards its long-term goals and regularly reviewing progress against strategic priorities
Policy Implementation and Review	All key policies should be reviewed and updated at least once every 3-5 years, with 100% compliance with review schedules.	Regular policy reviews ensure that the organisation's governance framework remains relevant, legally compliant, and aligned with current best practices.
Stakeholder Communication and Transparency	Timely communication of board decisions and rationale to stakeholders, with at least 90% of key decisions communicated within two weeks.	Effective communication and transparency build trust with stakeholders, including staff, parents, and the community, ensuring that the board's actions are understood and supported.

Top Tips

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

B is for Bias

We all have biases — unconscious assumptions, preferences, and blind spots that shape how we see the world and make decisions. In governance, bias can affect recruitment, decision-making, challenge, and oversight. Recognising and challenging bias is essential for fair, effective, and inclusive governance.

What is bias?

Bias is a tendency to favour or disfavour something, someone, or a particular perspective — often without realising it. It can be based on personal experience, background, culture, or assumptions.

Unconscious bias (also called implicit bias) refers to the attitudes and stereotypes that affect our decisions and actions without us being consciously aware of them.

Why it matters in governance

- It affects decision-making. If everyone on the board shares the same background, experience, or perspective, groupthink can set in. Decisions may be based on assumptions rather than evidence.

- It can perpetuate inequality. Bias can affect how we interpret data (e.g., assuming certain groups of pupils are "more challenging"), how we recruit governors, and how we respond to complaints or concerns.
- It undermines fairness. Governance should be impartial, evidence-based, and focused on the best interests of all pupils. Bias can skew priorities and decisions.
- It limits effectiveness. Diverse boards — in terms of background, experience, perspective, and thinking style — make better decisions. Bias can prevent boards from recruiting and retaining diverse members.

Common types of bias in governance

- Confirmation bias — seeking out or interpreting information in a way that confirms what we already believe.
- Affinity bias — favouring people who are similar to us (e.g., in background, experience, or views).
- Halo effect — letting one positive trait (e.g., confidence, eloquence) overshadow other factors.
- Recency bias — giving more weight to recent information or events rather than considering the full picture.
- Status quo bias — preferring things to stay the same, even when change is needed.

How to challenge bias

- Acknowledge it. The first step is recognising that we all have biases. It's not about blame — it's about awareness.
- Seek diverse perspectives. Actively recruit governors from different backgrounds, experiences, and viewpoints. Encourage challenge and dissent.
- Use evidence, not assumptions. Always ask: What does the data tell us? How do we know? What evidence supports this decision?
- Slow down. Bias thrives in rushed decisions. Take time to reflect, question assumptions, and consider alternative viewpoints.
- Ask better questions. Instead of "Do we agree?" ask "What are we missing? Who might be affected differently? What assumptions are we making?"
- Reflect regularly. As a board, take time to reflect on your decisions. Ask: Did bias play a role? What could we have done differently?
- Ask yourself if you have seen or experienced any of the common types of bias as a governor, trustee, or clerk.

Top Tip

At your next meeting, try this: before making a decision, ask *"What assumptions are we making here? What might we be missing?"* It's a simple but powerful way to surface and challenge bias.

See also: C is for Culture, D is for Diversity, E is for Equality, G is for Groupthink, Q is for Questions,

B is for Blog

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

B is for Board

All schools and academies have a governing board or body. In an academy trust governance responsibility sits at the trust board level and is managed through the Scheme of Delegation. In a maintained school there is a governing board which must meet at least 3 times per year as a minimum. If anyone tells you that you

will only have to attend 3 meetings per year as a new governor they are probably being somewhat economical with the truth...

The Academy Trust Handbook 2026 states *the academy trust is the legal entity, with the board having collective accountability and responsibility for the academy trust and assuring itself that there is compliance with regulatory, contractual, and statutory requirements*⁶.

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

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

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

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

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

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

Governing board meetings are not public meetings, so members of the public cannot simply attend. Attendance is limited to governors and individuals who have been specifically invited to participate. While this may seem like a closed process, the purpose is to support an effective meeting culture rather than to exclude others. Good meeting culture is essential to successful governance. It ensures that meetings are purposeful, well-managed, inclusive, and respectful of everyone's time and contributions. Although governing board meetings are held in private, they should not operate in secrecy. The minutes of governing board meetings should be made available on request, subject to the removal of any confidential or sensitive information where appropriate. This helps maintain transparency while protecting matters that require confidentiality.

See also: M is for Meeting.

Top Tips for Clerks

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

⁶ para 1.10

B is for Bothered

Bothered as an *adjective* means; a state of constructive concern that makes someone pay attention, ask questions, notice what is being missed and care enough to do something about it. Therefore, governance needs people who are bothered.

This does not mean being bothered in the sense of being irritated, obstructive or perpetually dissatisfied. Rather, bothered enough to notice the small things.

Good governance often begins with a small moment of discomfort: *That doesn't look right. Why are we doing it this way? What happened to that action? Who has checked this? What are we assuming? What happens to the people affected by this decision? Why are the papers late again? Why do we keep cancelling meetings?*

The person who is bothered does not have to arrive with the answer. Sometimes it is enough that they have noticed the question and cared enough to ask it

This matters because governance systems can become remarkably good at recording things without necessarily responding to them. Risks can sit on registers without being challenged. Actions can remain open without anyone noticing. Exceptions can become routine. Reports can be received without being understood. Meetings can take place without anyone asking an uncomfortable, or at times really obvious, question.

Compliance can become a substitute for curiosity, and being busy can become a proxy for governance impact. Good governance is not simply about having the right registers, reports, policies and minutes. It is about knowing what they are telling you, asking what needs to change and making sure that action follows.

Remember: A new governor or trustee is often in a uniquely valuable position to notice and gently question the norms, habits and assumptions that those who have been closer to them for longer may no longer see. Go on be brave!

B is for Boundaries

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

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

Remember the standards in public life apply at all times which can be challenging!

B is for Bravery

Sometimes to be really effective governance requires bravery. Bravery to ask the difficult questions. Bravery to challenge when something doesn't feel right. Bravery to speak up, even when it's uncomfortable. Bravery to admit when you don't know something. And bravery to do the right thing, even when it's hard.

Why bravery matters in governance

- Asking the difficult questions. Sometimes the most important questions are the hardest to ask. "Why are our exclusion rates so high for SEND pupils?" "How do we know this decision is in the best interests of children?" "What are we not seeing?" These questions can feel uncomfortable — but they're essential.
- Challenging the status quo. Just because something has always been done a certain way doesn't mean it's the right way. Brave governors ask "Why?" and "What if we tried something different?" And they insist on an answer.
- Speaking up when something's wrong. If you see something that doesn't sit right — whether it's a safeguarding concern, a financial irregularity, or a decision that feels rushed — you have a duty to speak up. That takes courage. (See also W is for Whistleblowing.)
- Admitting what you don't know. It takes bravery to say, "I don't understand" or "Can you explain that again?" But asking for clarity is not a sign of weakness — it's a sign of good governance. (See also U is for Understanding.)
- Doing the right thing, even when it's hard. Sometimes governance means making difficult decisions — decisions that might be unpopular, or that require difficult conversations. Brave governors stay focused on what's right for children, even when it's uncomfortable.

How to be brave

- Remember why you're here. You're governing for the benefit of children and young people. That's your reason. They are the purpose. When decisions feel difficult, come back to that.
- You're not alone. Governance is a team effort. If you're struggling with something, talk to the chair, vice chair, or clerk. Lean on your fellow governors. (See also B is for Belonging.)
- Prepare. Bravery is easier when you're prepared. Read your papers, do your research, and think about your questions in advance. Confidence comes from preparation.
- Start small. If you're new to governance, you don't have to ask the hardest question in your first meeting. Start by asking for clarification, or by building on someone else's question. Bravery is a muscle — it gets stronger and easier with practice.
- If you're the chair or an experienced governor, model brave governance. Ask the difficult questions. Admit when you don't know something. Create a culture where challenge is welcomed, not feared.

Questions to ask

1. When did I last ask a question that felt uncomfortable or difficult?
2. Do I feel safe to challenge and speak up in this board?
3. Are we creating a culture where bravery is valued and supported?
4. What would I do if I saw something that didn't feel right?
5. Am I staying focused on what's right for children, even when it's hard?

Top Tip

Before your next meeting, write down one question you feel nervous about asking. Then ask it. You'll be surprised how often the question you're most nervous about is the one that leads to the most important conversation.

See also: B is for Belonging, C is for Challenge, C is for Curious W is for Whistleblowing, U is for Understanding

B is for Bucket

If you hear the word bucket at a meeting, it is most likely to be related to GCSEs rather than a container for collecting water from a leaking roof. Although there will be times!

For those who are new to education — or simply do not have children at secondary school — bucket is a term that may be used when discussing pupil performance and progress. Exactly what it means can depend on the context, so this is one area where it is a very good idea to ask for an explanation.

If someone refers to pupils being “in different buckets”, do not assume everyone else knows what they mean. Good governance means being prepared to ask: “What does that mean, and what does it tell us?”

B is for Budget

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

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

C is for Cadence

This is a new word in the Glossary this year. Cadence simply means the regular rhythm and timing of governance activity. It is about having a planned pattern of meetings, reports, decisions, reviews and other governance activity across the year.

Why cadence matters

- It creates predictability and structure. Everyone knows when meetings are scheduled, when reports are due and when key decisions are likely to be made. This reduces last-minute panic, allows proper preparation and helps avoid late papers.
- It supports strategic thinking. A good cadence gives the board regular opportunities to step back, look at the bigger picture and consider longer-term priorities, rather than simply firefighting or reacting to events.
- It prevents overload. Too many meetings, or too much information arriving at once, can overwhelm governors and leaders. A steady cadence spreads the workload and gives people time to read, reflect and prepare.
- It strengthens accountability. Regular, consistent oversight makes it less likely that important issues are forgotten. Actions can be followed up, risks monitored and the impact of decisions reviewed.
- It respects everyone’s time. A clear cadence helps meetings remain purposeful and allows governors, trustees, clerks and leaders to plan ahead and come prepared.

What good cadence looks like

- Regular board meetings. Boards should meet often enough to discharge their responsibilities effectively and maintain appropriate oversight. Many boards meet termly, while others meet more frequently. The right cadence should allow enough time for preparation, reflection and follow-up.
- An annual cycle of business. The board has a clear plan showing what will be covered and when. This might include budget approval, policy reviews, safeguarding, curriculum and standards, risk, finance and pupil outcomes. This is often called an Annual Governance Calendar or Cycle of Business.
- Timely papers. Meeting papers should arrive with enough time for governors to read, think and prepare questions. Seven days is a useful benchmark where it can be achieved, but the important point is that papers arrive in sufficient time for proper scrutiny.
- Regular reporting. Key information, such as finance, safeguarding, attendance and pupil outcomes, is reported at an appropriate and consistent frequency. This allows the board to identify trends, spot emerging issues and ask better questions.
- A committee rhythm. Committees, such as finance, standards or pay, meet at a frequency that supports the full board’s work. There should be clear reporting lines, responsibilities and timelines.
- Link governor visits. These happen regularly throughout the year and have a clear purpose. They should not become a last-minute rush to gather evidence before an inspection.

- Review and reflection. The board builds in time to consider its own effectiveness, not just the performance of the school or trust.

Common challenges

- Too many meetings. Boards that meet too often can become operational and lose strategic focus. Ask: Do we need this meeting, or could this be dealt with by a committee or another appropriate route?
- Too few meetings. Meeting only occasionally can make it harder to maintain effective oversight, particularly during periods of change, challenge or uncertainty.
- Rushed decisions. If papers arrive late or meetings are squeezed into tight timeframes, there may not be enough space for proper scrutiny, discussion and challenge.
- No annual plan. Without a clear cycle of business, boards can miss key deadlines, duplicate work or fail to cover important statutory and strategic matters.
- Inconsistent reporting. If data or finance reports arrive sporadically, it becomes harder to identify trends, understand what has changed and hold leaders to account.

Questions to ask

1. Do we have a clear annual governance calendar setting out when key decisions will be made and what will be covered at each meeting?
2. Are our meetings spaced appropriately to allow time for preparation, reflection and follow-up?
3. Do papers arrive in sufficient time for governors to read and consider them properly? Are they the right length and quality?
4. Are we meeting too often or too infrequently? Are we spending too much time on operational matters, or do we have enough opportunity to maintain effective oversight?
5. Do our committees meet at the right frequency to support the work of the full board?
6. Are we building in time for reflection, review and strategic thinking — or are we always firefighting?

Top Tip

At the start of each academic year, review your annual governance calendar. Make sure it includes all statutory deadlines (e.g., budget approval, policy reviews, safeguarding audits) and builds in time for strategic discussions, not just compliance.

See also: A is for Agenda, A is for Annual Report and Accounts, C is for Committee, M is for Meetings

C is for Capacity

Capacity is about having enough people, time, skills, knowledge and resources to carry out governance effectively — without burning people out.

Good capacity means the workload is shared, skills are spread across the board, governors have time to read papers and undertake training, and there is effective succession planning.

Capacity can become an issue when:

- Vacancies remain unfilled;
- The chair or a small number of governors do most of the work;
- Governors feel overwhelmed or unable to keep up;
- Meetings are overloaded with information and lack time for strategic discussion; or
- Key activities such as training, link visits or monitoring are not happening.

Building capacity isn't just about recruiting more people. It is about recruiting for the skills you need, distributing leadership, developing governors and being realistic about workload.

If capacity is a concern, consider commissioning an External Review of Governance (ERG) to identify issues and possible solutions. [SBW Governance](#) can help with this — do please ask!

Questions to consider

1. Do we have the right skills and enough people?
2. Is the workload fairly distributed?
3. Do governors have enough time, support and training?
4. Are we developing future leaders and planning for succession?
5. Are we looking after the wellbeing of our governors?

External Support

- Consider commissioning an External Review of Governance to identify capacity issues and solutions. [SBW Governance](#) can help you – do please ask!
- Access support from governor services, clerking services, or organisations like IGovS or the NGA.

Top Tip: Once a year, ask the board: “Do we have the capacity to do this role well?” If the answer is no, don't just work harder — do something about it.

C is for Candour

Candour means being open, honest, and transparent — especially when things go wrong. It's about having the courage to speak truthfully, admit mistakes, and address problems head-on rather than hiding them or hoping they'll go away.

In governance, candour is essential. Without it, boards cannot make good decisions, hold leaders to account, or build trust with their communities.

Why candour matters

- It builds trust. When governors, trustees, and leaders are candid with each other, it creates a culture of openness and psychological safety.
- It enables better decisions. If people aren't honest about challenges, risks, or mistakes, the board can't address them effectively.
- It's part of the Nolan Principles. Honesty and openness are two of the seven principles of public life that all governors and trustees must uphold.
- It prevents problems from escalating. Small issues that are hidden or downplayed can become major crises. Candour allows problems to be tackled early.
- It models good behaviour. When leaders and governors demonstrate candour, it sets the tone for the whole school community.

What candour looks like in practice

- Admitting when you don't know something — *"I'm not sure about that. Can we find out more?"* There is no shame in not knowing something; you probably won't be the only one!
- Raising concerns even when it's uncomfortable — *"I'm worried about this. Can we discuss it?"*
- Being honest about mistakes — *"We got that wrong. Here's what we're going to do about it."*
- Sharing difficult news — *"The data shows we're not making the progress we hoped for. Do we need to change our approach."*
- Challenging when things don't add up — *"I'm not convinced by this. Can you help me understand?"*

The balance

Candour doesn't mean being brutal or insensitive. It's about being honest and respectful. You can be candid without being unkind.

Common barriers to candour

- Fear of conflict — worrying that being honest will cause upset or confrontation
- Desire to be liked — not wanting to be seen as difficult or negative
- Loyalty — feeling that raising concerns is disloyal to the headteacher or the school
- Hierarchy — feeling that it's not your place to question senior leaders
- Groupthink — going along with the majority even when you have doubts

Remember: Candour is a governance behaviour that takes practice and courage. But it's essential for effective governance. Without it, boards risk missing problems, making poor decisions, and losing the trust of their communities.

See also: B is for Bravery, C is for Challenge, P is for Psychological Safety, W for Whistleblowing

C is for Careers

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

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

The DfE published updated careers guidance in June 2026⁷. This sets out that the governing body should provide clear advice and guidance to the school or college leader on which they can base a strategic careers plan which meets the legal or contractual requirements of the school or college. The plan should:

- Be developed in line with the Gatsby Benchmarks
- Be informed by the requirements and expectations set out in this document
- Show how the careers programme will be implemented
- Show how its impact will be measured
- Have a named person at trust board level with a remit for careers

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

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

C is for CEO (academy trusts only)

Chief Executive Officers work in academy trusts are usually the trust's Accounting Officer as well. They are the main person leading and managing, with the support of the trust board and the executive leadership team, the whole organisation. If you are on a Local Governing Board in a large trust you may not meet the

⁷ [Careers guidance and access for education and training providers - GOV.UK](#)

CEO in person, but you must know who they are. You can look them up on the trust's website. Sometimes the CEO is called the Senior Executive Leader.

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

C is for Chair

Every board needs a chair, and every meeting needs a chair – though they don't have to be the same person.

Chair of the Board

The chair of the board, often called the Chair of Governors or Chair of Trustees, is elected on a regular basis (usually, but not always, annually) by the other members of the board. This should be based on who has the most appropriate skills and experience for the role, and is not meant to be a popularity contest!

- Whilst there's no statutory rule on how long someone should serve as chair, common sense suggests they shouldn't hold the position indefinitely. The National Governance Association recommends 2 terms of 4 years, though this is guidance rather than a legal requirement.
- Some schools and trusts have specific role descriptions for the chair, which provide a helpful starting point for minimum requirements. These should be tailored to your specific governance context. In academy trusts, Chairs of Trustees are subject to specific additional DfE suitability checks.

Vice Chair

Every board should have a vice chair, and this role is becoming increasingly important – not only for succession planning but also to support distributed leadership. The chair and vice chair should work together, supporting and challenging not only the leadership team but also each other.

Co-Chairs

Some boards, more commonly in maintained schools, have co-chairs where two people share the role. This is an excellent way to manage the increasing workload, but there must be clear lines of accountability between the two co-chairs and a fair, appropriate division of responsibilities and clear communication protocols.

Separation of Duties

In academy trusts, it's vital that the Chair of Trustees and the Chair of the Audit and Risk Committee (or Finance Committee) are different people. This ensures transparency and proper oversight. This good practice should also apply in maintained schools.

Committee Chairs

Committee chairs are equally important roles, and a strong committee chair is an asset to any governing board. Their responsibilities include setting agendas, ensuring effective scrutiny within their committee's remit, and reporting back to the full board on key decisions and areas of concern.

C is for Chair's Action

One of the main standing (regular) items on a board meeting agenda is Chair's Action – this is different from Power to Act (see below).

Chair's Action is used by chairs to give a short update on routine, non-urgent matters and actions taken that are not Powers to Act. This might include:

- Meeting with the headteacher or CEO
- Attending meetings in their capacity as chair
- Representing the board at school or trust events
- Correspondence handled on behalf of the board

There may not be a written report prepared by the chair, but the key headlines should still be recorded in the minutes so the board has a clear record of what was done. Some chairs also prepare regular newsletters for their boards — quite how they find the time is another matter!

C is for Chair's Power to Act

Regulation 8 of the School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 sets out the chair's power to act on behalf of the governing board in cases of urgency or emergency. Remember clerks these regulations do not apply to academy trusts.

It's really important to ensure good governance that chairs only do what they're allowed to do by law. The power to act should only be used in exceptional circumstances when a decision absolutely cannot wait until the next board meeting.

Examples of urgent situations might include

- An urgent safeguarding matter requiring immediate action
- An emergency building closure requiring immediate health and safety decisions
- An urgent staffing matter that cannot wait until the next board meeting

Key requirement

- All actions taken using Power to Act must be reported to the board at the next meeting
- A record must always be kept
- If your chair is using Power to Act frequently, it's perfectly acceptable to ask why

Academy trusts

In academy trusts, delegated power to the Chair must be expressly given and recorded in the minutes. Even where this power has been delegated, there may be restrictions on what decisions the Chair can make independently. Check your Scheme of Delegation for clarity on what powers have been delegated to the Chair.

Remember: Chairs should not make decisions outside the board unless they have a clear, lawful power to do so and the matter is genuinely urgent. If a decision cannot wait until the next scheduled meeting, the first question should be whether an extraordinary general meeting, extraordinary board meeting or urgent meeting should be called instead. Power to Act is a safety net, not a shortcut.

See also: references throughout the Glossary to the Scheme of Delegation

C is for Challenge

Challenge is one of the most important things governors and trustees do. It's about asking the right questions to test assumptions, explore evidence, and drive improvement – it is not about being difficult or aggressive. The best boards have a culture where challenge is expected and welcomed by everyone with a seat around the board table.

Why challenge matters

Without challenge, boards risk rubber-stamping decisions, missing problems, and falling into groupthink. Ofsted expects governors and trustees to "typically support and challenge leaders appropriately, giving due regard to leaders' and staff wellbeing and workload". How Ofsted inspects leadership and governance. Challenge is how you hold leaders to account and ensure the best outcomes for pupils.

The balance

Challenge and support go hand in hand. You're not there to catch people out or undermine leadership – you're there to ask questions that help leaders think more deeply and make better decisions. The best boards have a culture where challenge is expected and welcomed.

How to challenge well

- Ask curious questions – Start with "why?", "how do we know?", and "what's the evidence?" (**See also:** C is for Curious and Q is for Questions)
- Use evidence – Base your challenge on data, research, and what you've seen in the school
- Be respectful – Challenge the idea, not the person. Stay constructive and professional
- Listen to the answer – Challenge is a conversation, not an interrogation!

What good challenge sounds like

- *"That's interesting – what evidence do we have that this approach is working?"*
- *"How does this compare to national benchmarks?"*
- *"What would success look like and how will we measure it?"*
- *"Have we considered the impact on disadvantaged pupils/pupils with SEND?"*
- *"What are the risks if this doesn't work?"*

Common pitfalls

- Being too deferential to the headteacher or senior leaders
- Not challenging because you don't want to seem difficult
- Asking questions that sound like you're checking up on people
- Confusing challenge with criticism or conflict

Remember: Challenge is a skill that improves with practice. New governors often find it hard (especially when challenging experienced leaders), but it gets easier. If you're not sure how to challenge, start by being curious and asking genuine questions.

See also: B is for Bravery, C is for Curious, G is for Groupthink Q is for Questions

C is for Clerk

Formal governance meetings need a clerk. The role is much more than taking minutes: a good clerk helps the board operate effectively, follow the right procedures and make sound decisions.

The role

The clerk role is an increasingly professional one and is now frequently called the Governance Professional.

Clerks are the constitutional and legal conscience of the board. They should be impartial and, preferably, independent of the school. Where they are employed by the school or trust, they must still be able to act impartially and challenge with confidence.

Clerks should be properly resourced and paid for their work. Qualifications and professional development are available in clerking and academy governance, including those offered by the Chartered Governance Institute (CGI, formerly ICOSA) and the National Governance Association.

Not all clerks clerk panels. Some clerks will clerk pupil exclusion panels, staff dismissal panels and complaints panels, but these require different knowledge and expertise. Check what your clerk's role includes and whether additional clerking support is needed for panels.

The clerk is not the chair's or headteacher's PA

The clerk works for the whole board, not for the chair or headteacher.

The chair and clerk will work closely together, particularly on agendas and meeting preparation. The headteacher or CEO may also work closely with the clerk on papers, reports and practical arrangements. But when the clerk is carrying out their governance role, they are there to support the board as a whole.

The clerk should be impartial and willing to advise, question and, where necessary, challenge the chair, headteacher or CEO. Their job is not to take instructions from one individual or simply facilitate what the school wants to happen. Their role is to help the board govern effectively, follow the correct procedures and make properly informed decisions.

This remains true even where the clerk is employed directly by the school or trust. In governance, who pays the clerk and who the clerk serves are not always the same thing.

Your relationship with the clerk

- The chair, headteacher or CEO and clerk should be in regular communication. As a new governor, you may not have much contact with your clerk between meetings, but you should know how to contact them. If they email you, respond as promptly as you can.
- Your clerk is there to offer advice and support to the whole board. They may lead parts of a meeting, such as the election of the chair, or provide updates on training opportunities, governance requirements or key documents.
- A clerk should never be “seen but not heard.” Their expertise is there to help the board govern well.

Different clerking models

- Service Level Agreements (SLAs): Clerks are often provided under an SLA, where the school pays an annual fee to a service provider, not always the Local Authority, for a set number of meetings. If you are chair of governors, find out exactly what you are paying for, what the service provider provides centrally and what the school is expected to do itself. Depending on the arrangement, this might include agenda setting, managing governance databases, supporting elections, preparing annual attendance information and clerking panel meetings.
- Academy trusts: In an academy trust, the Governance Professional may clerk trust board meetings but not all local governing board meetings, which may be clerked by others under an SLA or contract. The Governance Professional may also be called the Trust Governance Lead or Head of Governance. Some trusts have a governance team; others have one person carrying out the role, who may not be full time. Find out who provides governance support in your trust and what their responsibilities are. If they are supporting several schools or boards, allow reasonable time for a response.
- Independent clerks and Governance Professionals: Some schools and trusts use an independent clerk or Governance Professional who is self-employed or works through an external governance service. This can provide a useful degree of independence from the school or trust and can give boards access to specialist knowledge and experience. As with any clerking arrangement, the key question is whether the person has the time, expertise and independence to support the board effectively.
- Internal clerks: In some cases, the clerk role is undertaken by someone who works in the school in another capacity. If this is the case, they should have a separate job description for their governance duties and be given adequate time to prepare agendas, maintain records, complete minutes and carry out other governance administration.
- They must also be able to remain impartial and respect confidentiality.
- Company Secretaries: In some academy trusts, the company secretary undertakes governance responsibilities that may include the clerk or Governance Professional role. The company secretary may have responsibility for the trust's corporate governance, statutory filings and company law requirements, alongside supporting the board and its committees. The exact division of responsibilities will vary between trusts, so trustees and governors should understand who is responsible for which aspects of governance.

Who manages the clerk?

The arrangements for managing and performance-reviewing a clerk or Governance Professional will depend on who employs or contracts them. However, the board has an important interest in the quality and effectiveness of its governance support.

Governors and trustees should make sure there is a clear process for setting expectations, reviewing performance and identifying training or development needs. Where appropriate, the chair or another designated governor or trustee may contribute to the clerk's performance review, while the employing organisation remains responsible for the formal employment arrangements.

A useful question for any board, regardless of its clerking model, is: “Are we getting the governance support we need, and how do we know?”

Keeping records

Not every conversation between governors needs to involve the clerk, but where governors meet to discuss a school-related issue or make decisions, there should be appropriate records and transparency.

This helps prevent informal decision-making and avoids cliques or groups developing outside the formal governance structure.

The chair and headteacher or CEO will naturally meet more often than other governors and trustees. This can be an important and productive relationship, but it should not become too cosy — nor should it become strained or adversarial.

As a new governor, pay attention to the dynamics around the board table. If relationships look or feel awkward, unprofessional or exclusionary, raise your concerns respectfully. Your clerk may be able to help you understand how the board operates and explain its norms and procedures.



Remember: It is harder to clerk than it looks. Your clerk does much more than take the minutes of the meetings you attend.

C is for Code of Conduct

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

1. Sets clear expectations – so all governors/trustees know what professional conduct looks like
2. Promotes effective governance – keeping governors and trustees focused on strategy, not day-to-day operations
3. Protects reputation – ensuring those with a governance responsibility act with integrity, respect, and in line with the Nolan Principles of Public Life
4. Supports good decision-making – by encouraging openness, respectful challenge, and collective responsibility
5. Provides accountability – giving a shared benchmark to uphold high standards and address concerns if they arise
6. Describes relationships - between individual governors/trustees/staff/academy committee or LGB members, the whole governing board, and the executive leaders in school

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

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

- 1. Selflessness:** Holders of public office should act solely in terms of the public interest.
- 2. Integrity:** Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships.
- 3. Objectivity:** Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias
- 4. Accountability:** Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.
- 5. Openness:** Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.
- 6. Honesty:** Holders of public office should be truthful.
- 7. Leadership:** Holders of public office should exhibit these principles in their own behaviour and treat others with respect. They should actively promote and robustly support the principles and challenge poor behaviour wherever it occurs.

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

If you are a clerk the principles also apply to you, and you may wish to sign the code of conduct at the same time as the governors or trustees or minute that you are willing to follow its requirements. However, this is not mandatory.

Top Tip

Ask yourselves what do the Nolan Principles mean to you and your board? You might get some interesting answers, and it is a quick and thought provoking way to think about the governance behaviours around the board table. Please read the Code of Conduct carefully before signing you have read it.

C is for Cohort

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

- Year groups
- Girls and boys
- Pupils for whom English is not a first language
- Pupils on the SEND register
- Pupils in receipt of pupil premium
- Safeguarding information (anonymised)
- At secondary or tertiary level by subject
- Other groups appropriate and relevant to your setting

Remember: if your cohorts are small, one pupil can represent 5%, 8% or even more of the total. Always ask how many pupils are in the cohort, because this will affect how you interpret the data. It is also worth asking

how many of the same children were on roll at the start and end of the academic year, or how many started in Reception and remained through to Year 6. This is sometimes referred to as pupil mobility, and in some schools movement can be as high as 30%. Think carefully about how this may affect outcomes or assessment data. Good data reports usually show both the percentage and the actual number of pupils in the cohort, so governors have the context they need.

C is for Collaboration

You cannot govern effectively in isolation. It is increasingly common for schools to work together, even when they are not part of a formal structure such as an academy trust. Being collaborative is about looking outwards rather than inwards: sharing ideas, learning from others and recognising that schools do not have to solve every problem on their own.

Collaboration can take many forms. Schools may work together on professional development, curriculum, safeguarding, attendance, SEND, procurement or leadership development. Governors and trustees can also learn from other boards by sharing approaches, visiting other schools and comparing how different governance teams tackle similar challenges.

Some trusts are now working with associate partners — schools with similar values that are not ready, for a variety of reasons, to join an academy trust. This can allow schools to build relationships, share expertise and benefit from support while retaining their existing structures and autonomy.

For governors, collaboration does not mean losing independence or simply agreeing with what another school is doing. It means being curious about what others can teach you, while asking whether an approach is right for your own pupils and context.

A useful question is: “Who could we learn from, and what could we learn from them?”

C is for Collective Responsibility

Collective responsibility means that once the board has made a decision, all governors and trustees are expected to support it publicly — even if they disagreed during the discussion. Robust debate is part of good governance; so is accepting the decision once it has been made. You can challenge, question and disagree in the meeting, but the board should speak with one voice afterwards.

This protects the integrity of the board, maintains trust with stakeholders and gives leaders the clarity they need to implement decisions. If you fundamentally cannot support a decision, you should ask for your dissent to be recorded in the minutes. You should still respect the board’s collective decision and avoid undermining it outside the meeting.

Sometimes this is not easy to accept, particularly when you feel strongly about an issue. But collective responsibility is not about everyone agreeing; it is about everyone understanding how a decision was reached, respecting the process and standing behind the board once the decision has been made.

See also: C is for Challenge, C is for Code of Conduct, C is for Confidentiality

C is for Committee

Not all governing boards have committees, but where they do, each should have a chair, approved terms of reference, an agenda and minutes, preferably taken by the clerk. Committees are the engine room of many governing boards. They provide space for more detailed discussion and scrutiny, allowing the full board to focus on the bigger strategic picture. It is important to understand how your committees work and, where you are a committee member, to attend regularly so that you know what is being discussed and decided.

Some maintained schools do not have committees, and all matters are discussed by the whole board at full governing board meetings. This is sometimes called the circle model of governance. If this is the model used in your school, there should still be appropriate arrangements for matters such as pay to be considered and recommendations made transparently. Whatever the model, governors should understand where decisions are made, what has been delegated and how committees report back to the full board.

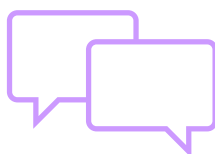
Committees should add value, not simply create more meetings or duplicate work. Their purpose is to provide depth of discussion, effective scrutiny and, where appropriate, quicker decision-making. A good committee knows what it is there to do, stays within its terms of reference and makes sure the full board has the information it needs to maintain effective oversight.

Remember: Committees should make governance stronger, not more complicated.

See also: D is for Duplication

C is for Communication

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



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

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

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

Top Tip

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

C is for Competent

No one, one would hope, is deliberately incompetent. And with the amount of information and guidance available today, there is little excuse for not finding out what you need to know. But being competent does not mean knowing everything. It means knowing what you know, recognising what you don't know and taking responsibility for finding out.

The late Donald Rumsfeld, former United States Secretary of Defence, famously talked about “known knowns”, “known unknowns” and “unknown unknowns” — the things we know, the things we know we don't know, and the things we don't yet realise we don't know.

Good governance requires all three to be taken seriously. Ask questions, seek advice, use the information and training available to you, and don't be afraid to say, “**I don't know — but I need to find out.**” Even experienced governors and trustees learn something new.

C is for Complaint

The difference between a concern and a complaint;

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

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

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

The DfE have advise on their website about how to manage complaints⁸ which is worth a read.

Top Tips

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

Impact on workload

School leaders have reported that managing complaints has become a significant driver of workload. The DfE⁹ is working with parents and schools to better understand the challenges and explore possible solutions. They have suggested that these questions may support schools to reflect on this issue.

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

Guidance is available at;

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

C is for Complaints Panel

A complaints panel is the final stage of a school or trust's complaints procedure. It's a formal hearing where a panel of governors or trustees reviews a complaint that hasn't been resolved at earlier stages.

⁸ Best practice guidance for school complaints procedures 2020

⁹ [Conversation guide for workload and wellbeing in schools and academy trusts - GOV.UK](#)

Who sits on the panel?

The panel should consist of three people who have not been involved in the complaint previously. This typically includes:

- Governors or trustees who have had no prior involvement
- At least one person who is independent of the management and running of the school

The panel must be impartial. If you've been involved in the complaint at any earlier stage, you cannot sit on the panel.

What does the panel do?

The panel's role is to:

- Listen to both sides of the complaint
- Review the evidence presented
- Consider whether the school followed its complaints procedure correctly
- Decide whether the complaint is upheld, partially upheld, or not upheld
- Make recommendations (if appropriate) about what should happen next

Important: The panel is not there to re-investigate the complaint or to apportion blame. It's there to ensure the process has been fair and to reach a conclusion based on the evidence.

Key requirements

- Training is essential. Sitting on a complaints panel requires specific skills and knowledge. Make sure you've had training before you agree to sit on a panel. It is absolutely worth the effort.
- A clerk is needed. The panel should be clerked by someone independent (not the school's usual clerk if they've been involved in earlier stages) who has also been trained
- Impartiality is crucial. You must approach the panel with an open mind and without any preconceptions. If you know the pupil or their family then you should recuse yourself
- Confidentiality must be maintained. Everything discussed in the panel hearing is confidential.
- The decision is final. Once the panel has made its decision, that's the end of the school's complaints procedure. The complainant can take their complaint to the Education and Skills Funding Agency (for academies) or the Local Authority (for maintained schools) if they believe the procedure wasn't followed correctly, but they cannot appeal the panel's decision.

Common pitfalls

- Sitting on a panel without proper training (although this is happening less frequently)
- Not maintaining impartiality
- Allowing the hearing to become confrontational
- Not following the complaints procedure correctly
- Failing to keep proper records

Top Tip:

If you're asked to sit on a complaints panel and you haven't had training, say no. It's not fair on you, the complainant, or the school. Complaints panels are challenging, and you need to know what you're doing.

See also: C is for Complaint, C is for Confidentiality,

C is for Compliance

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

- Legal and Regulatory adherence e.g., education law, safeguarding, data protection, Health and Safety, company law if you are in a trust

- Policy alignment – following internal policies, codes of conduct, and adopted standards set by the board/trustees
- Assurance and accountability – being able to evidence that the school or trust is meeting these requirements through reporting, monitoring, and audit
- Risk management – ensuring compliance risks are identified, monitored, and mitigated, reducing exposure to sanctions, reputational damage, or financial loss

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

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

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

C is for Confidentiality

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



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

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

C is for Conflicts and Declarations of Interest

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

At the beginning of every meeting there should be an opportunity for you to declare any business or pecuniary interests you may have in any matters on the agenda. This should cover;

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

It is increasingly important, in the name of transparency, that these declarations are recorded. It is also good practice that you inform the school of any business interests you may have as these have to be kept on a

register – better to be safe than sorry. You will also be asked to complete a business interests form (this may be online) on a regular basis and it is up to you to ensure that you inform the school of any changes. Business and governance interests must be published on the school or trust website at least annually and are increasing published on a live up to date basis. If you are not sure, talk to the chair, clerk, or the School Business Manager (as they often lead on this area).

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

The Register of Business Interests

All schools and trusts must maintain a Register of Business Interests (sometimes called the Register of Interests or Register of Pecuniary Interests). This is a formal record of all governors', trustees', and members' business and pecuniary interests, including:

- Employment and directorships
- Shareholdings and partnerships
- Governance roles in other organisations
- Relationships with staff or other governors/trustees
- Any other interests that could create a conflict

The register must be:

- Kept up to date – governors and trustees must inform the clerk or governance professional of any changes; it is your responsibility to keep your information up to date on the preferred governance platform (e.g. Governor Hub, Trust Governor, Governors Virtual Office, Teams, SharePoint etc)
- Reviewed regularly – at least annually, and ideally at the start of each meeting
- Published on the school or trust website – this is a transparency requirement for both maintained schools and academies

Remember it is not your role as a governor/trustee to keep the website up to date – just to check the information about you is correct.

Top Tips

- Don't wait until a conflict arises to update the register. If your circumstances change (e.g., you start a new job, become a governor elsewhere, or a family member joins the school staff), tell the clerk straight away. It's much easier to manage a declared interest than an undeclared one.
- When in doubt – ask.

See also: P is for Pecuniary and Business Interests, G is for Gifts and Hospitality, R is for Related Party Transactions

C is for Context

Context is the background, circumstances and environment in which a school operates. It includes its location, community, pupil demographics, history, challenges and strengths. These factors can influence everything from pupil outcomes and behaviour to staffing and budgets.

Context is everything. Data, decisions and judgements mean little without it. A school's results, attendance figures or exclusion rates cannot be understood in isolation; they need to be considered alongside the pupils the school serves, their starting points and the circumstances in which the school is operating.

Why context matters

- Data without context can mislead. A school with 95% attendance might appear to be doing well, but if the national average is 96% and the school serves a relatively stable community, there may

be cause for concern. Conversely, 92% attendance in a highly transient or disadvantaged community may represent significant improvement and strong practice.

- Benchmarking needs context. Comparing your school with national averages or “similar schools” can be useful, but only if you understand how similar those schools really are.
- Decisions need context. What works in one school will not necessarily work in another. Governors need to understand their own circumstances to make informed and appropriate decisions.
- Inspection and accountability need context. External scrutiny should consider a school's circumstances alongside its outcomes and evidence of progress. Governors should be able to explain the context in which their school is operating and how it informs their priorities.
- Context shapes strategy. Your vision, priorities and improvement plan should respond to the needs and circumstances of your school, rather than simply reproducing a generic template.

What context includes

- Pupil demographics — Proportion of pupils with SEND, disadvantaged pupils, EAL pupils, looked-after children, pupil mobility and other relevant characteristics.
- Community and location — Urban, rural or coastal setting; levels of deprivation, employment, housing and other local factors.
- School history — Recent inspection outcomes, leadership changes, mergers, conversions, previous challenges and successes.
- Staffing — Recruitment and retention challenges, turnover, experience and expertise.
- Finances — Budget pressures, funding levels and any historical deficits or surpluses.
- Cohort size and stability — Small cohorts, falling rolls, high pupil mobility or other factors affecting the make-up of the school.
- Local partnerships — Relationships with the local authority, other schools, the diocese and community organisations.

Questions to ask

1. Do we understand our school's context? What are our community's, pupils' and school's key strengths and challenges?
2. How does our context affect outcomes, attendance, behaviour and wellbeing?
3. Are we comparing ourselves with the right schools? Are our benchmarks genuinely meaningful?
4. How does our context shape our strategic priorities? Is our plan tailored to our school or could it belong to any school?
5. What barriers are our pupils facing, and how are we responding to them?
6. Can we explain our context clearly to Ofsted, parents and other stakeholders?

Top Tip:

When you're looking at data, always ask: “What's the context?” Don't accept numbers at face value. Ask about cohort size, pupil mobility, starting points, changes over time and the barriers pupils may face. Context helps you understand what the data is really telling you — and what it isn't.

See also: D is for Data, B is for Benchmarking, C is for Cohort, K is for Knowing Your School, O is for Outlier

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

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

Some trusts have trust appointed governors as well. As with other governors the term of office is usually 4 years. Some trust boards also have a process for approving co-opted governors appointments where the

trustees review the skills and experience of the potential governors prior to them joining the Local Governing board.

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

C is for Covid-19

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

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

It is important to remember that the impact of Covid on our children and young people is still very evident – even in 2026 and will be for some time.

C is for Climate Change

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

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

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

Maybe climate change and environmental sustainability should be a regular item board agendas? Particularly after the heatwaves of the summer term 2026.

C is for Critical Success Factor

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

Why not ask ...

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

C is for Culture

There are many books and theories about culture, and you will often hear the word used when discussing schools and trusts. But culture is not easy to define. It is, in simple terms, how things feel, what people value and how people behave when no one is telling them what to do.

A useful way to explore culture is to ask:

1. What does the school feel like?
2. What do our meetings feel like?
3. What words would I use to describe the culture of the school or trust?
4. What do staff, parents, children and young people say about it — and when did we last ask them?
5. Where is the evidence of the culture in practice?

For a governing board, culture is reflected in how people communicate, make decisions, handle disagreement, challenge and support each other, respond to risk, hear different perspectives and hold themselves and others to account. It is shaped by both formal expectations and informal behaviours. A board can have excellent policies and procedures on paper but still have a poor culture if people are afraid to speak up, challenge is discouraged or decisions are made informally.

Culture is therefore something governors and trustees should notice, discuss and test, rather than simply assume is good. And whatever the wider culture of a school or trust, one thing must be non-negotiable: everyone should have a lived culture of safeguarding. Safeguarding should be evident not just in policies and training, but in everyday attitudes, behaviours and decisions.

A useful question is: “What does our culture tell us about how this school or trust really works?”

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

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

Think piece activity – culture makes meaning



Culture is the lens through which people interpret expectations, behaviours, and decisions. It shapes what becomes meaningful — and what quietly fades into the background. Values, when genuinely lived, move beyond statements: they influence choices, relationships, and the lived experience of pupils, staff, and leaders.

This mantra reminds boards that governance is not only structural; it is cultural. When trustees understand how culture creates meaning, and how values shape lives, they can align their behaviours and decisions with the impact they want to see.

What do you see in your schools and trusts? Spend some time mapping your governance culture by looking at minutes, your website, policies, and communications. Are your values front and centre? Are they lived, or simply listed?

Remember:

Culture makes meaning	Values change lives
Culture is how people <i>understand</i> expectations, risks, accountability, and purpose. A school or trust with strong culture doesn't just follow rules — it <i>knows why</i> those rules matter	Values are the bridge between governance and impact. They shape decisions, priorities, and the lived experience of pupils, staff, and communities. When values are real — not laminated — they shift practice, behaviour, and outcomes.

Further reading: There are many useful resources on school and governance culture. The [Harvard Graduate School of Education](#) offers one perspective, while Ambition Institute's *Expert Edit: Building school culture* is another useful starting point.

C is for Cultural Capital

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

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

C is for Curious

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

In the past, the DfE published a Competency Framework for governors (as well as for clerks). Whilst this guidance has been withdrawn, there are a number of useful definitions contained within the framework. The definition of curiosity is one such definition. Under the "Principles and personal attributes" section, the framework outlined that every board member should be: **Curious** — "*Possessing an enquiring mind and an analytical approach and understanding the value of meaningful questioning.*"

Curiosity is not about catching people out — it's about understanding what's really happening and making sure decisions are based on good evidence.

Curious Questions Matter.

Top Tips:

- If you feel something is not right, say so. Ask questions. Consider the answers. Seek more information.
- Balance curiosity with reasonableness. You need to be professionally curious (just as your safeguarding training tells you to be) but also know when to accept an answer and move on.

See also: C is for Challenge, Q is for Questions

C is for Curriculum

The curriculum is what the school teaches — the knowledge, skills, and experiences pupils gain during their time at school. It includes the National Curriculum (statutory for maintained schools) and everything else the school chooses to teach to reflect its values, context, and ambitions for pupils.

Governors and trustees have a statutory duty to ensure the school has a broad, balanced, and ambitious curriculum that meets the needs of all pupils.

Why it matters:

- It's central to what schools do. The curriculum shapes what pupils learn, how they learn it, and the opportunities they have.
- It's a core governance responsibility. Governors must ensure the curriculum is broad, balanced, inclusive, and ambitious for all pupils — including those with SEND and disadvantaged pupils.
- Ofsted places significant emphasis on the curriculum. Inspectors will focus on curriculum intent (what you want pupils to learn), implementation (how you teach it), and impact (what difference it makes).
- It reflects your values. The curriculum should embody the school's vision and values, and prepare pupils for life in modern Britain.

What governors need to know:

- The National Curriculum is not the whole curriculum. Maintained schools must teach the National Curriculum, but all schools (including academies) can — and should — teach much more. This includes enrichment, extra-curricular activities, personal development, and the "hidden curriculum" (e.g., values, culture, relationships).
- Curriculum is more than subjects. It includes what is taught, how it's taught, and the experiences pupils have. Think about trips, clubs, assemblies, and opportunities for leadership and responsibility.

Questions governors could ask

1. How does our curriculum reflect our school values and vision?

2. How do we ensure the curriculum is ambitious and inclusive for all pupils, including those with SEND and disadvantaged pupils?
3. What enrichment and extra-curricular opportunities do we offer, and how do we ensure all pupils can access them?
4. How do we know our curriculum is having the intended impact? What does the evidence tell us?
5. How are we preparing for the new Ofsted framework?

Top Tip

Don't just ask "Do we have a curriculum?" Ask "What difference is our curriculum making to pupils' knowledge, skills, and life chances?" That's the question that matters. |

See also: C is for Cultural Capital, E is for Enrichment, E is for Equality, O is for Ofsted, V is for Values

C is for Cyber Security and Digital Standards

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

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

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

Top Tips

- If you have a school or trust email address – use it. It may be a little inconvenient at times but this is a minor irritation compared to dealing with a cyber incident or having to provide all your personal emails for a Subject Access Request. Schools and academies are increasingly being targeted by cyber-attacks.
- If you are asked to complete cyber security training even if you have done it before please ensure that you do – it is really important. None of us are immune.

D is for Data

It is really important that if you are a new governor you are given data about the school. You should not have to be a data analyst to interpret the data provided. In fact, as a new governor you are in an ideal position to let people know if the data is actually impenetrable as it is easy to slip into accepting confusing or complex data without challenge and that this then becomes the norm.

You should be reminded at your first few meetings that if you are a parent you must not discuss your child's data or personal circumstances in the governing board meeting and your first port of call is your child's class teacher.

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

1. Are there differences between what the school predicts the outcomes will be to what the outcomes actually are? This is a really important question and should always be asked. There can be a positive and a negative difference.

2. What happened and why; and
3. What are the school leaders going to do differently? What else do we need to ask?

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

Official Government Sources

- Compare School and College Performance (formerly School Performance Tables) <https://www.compare-school-performance.service.gov.uk/> - shows published performance data, progress scores, attainment, and destinations
- Get Information About Schools (GIAS) <https://get-information-schools.service.gov.uk/> School details, governance information, pupil numbers, and basic data
- Analyse School Performance (ASP) <https://www.compare-school-performance.service.gov.uk/> More detailed performance data for those with access (headteachers can grant governor access)
- Find and Compare Schools in England <https://www.gov.uk/school-performance-tables> Ofsted ratings, exam results, absence, and pupil population data

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

If you have a standards and achievement committee (also called teaching and learning or quality of education and outcomes committees) they should be scrutinising the data in depth. They should ensure that they ask detailed questions about progress, outcomes, and the curriculum. You should always ask about pupils in receipt of Pupil Premium, SEND pupils, those with an Education Health Care Plan, and Looked After Children¹⁰. There are some national statistics [here](#); and information from the NSPCC [here](#) to help you with your questions.

Don't Panic: You don't need to be a data analyst to be an effective governor. Your job is to ask curious questions about what the data means, not to crunch the numbers yourself.

D is for Data Protection

Use your school email address for all school business – always.

Data protection is about keeping personal information safe, secure, and used appropriately. As a governor or trustee, you handle sensitive information about pupils, staff, and families – and you have a legal responsibility to protect it.

The most important thing you can do? Use your school or trust email address for all governance business. Not your personal Gmail. Not your work email from your day job. Your school email!

Why it matters

Using your personal email for school business can create serious risks

- Data breaches – if your personal email is hacked, school data could be compromised
- Loss of control – the school can't manage, monitor, or retrieve emails sent to/from your personal account
- GDPR violations – mixing personal and school data makes it harder to comply with data protection law
- Subject Access Requests (SARs) – if someone requests their data, the school may need access to your emails. If they're in your personal account, that's a problem

¹⁰ There is a very readable book called 'Young People on the Margins' by Loic Menzies and Sam Baars which you might like to share with your board.

- Lack of security – school email systems have encryption, security protocols, and backup. Your personal email may not

D is for Dashboard

A dashboard is a visual tool that presents key data and metrics about school performance in an accessible, at-a-glance format. It typically uses charts, graphs, and indicators to show trends and patterns across areas such as pupil outcomes, attendance, behaviour, safeguarding, finance, and staffing. Dashboards help governors and trustees monitor the school's strategic priorities without getting lost in detailed operational data.

Dashboards are particularly useful for:

- Quickly identifying areas that need attention or further investigation
- Tracking progress against strategic objectives over time
- Making data accessible to all board members, regardless of their data analysis experience
- Generating those all-important curious questions that lead to effective challenge

Pitfalls to avoid

Whilst dashboards are valuable tools, be aware that they can oversimplify complex situations. A single red or green indicator doesn't tell you *why* something is happening or what the context is behind the numbers. Use dashboards as a starting point for deeper discussion, not as the end point. The best boards use dashboards to spark curious questions like "What's behind this trend?" or "What are we doing differently to address this?" rather than simply accepting the data at face value. Remember - if the dashboard is impenetrable or confusing, say so! As with all data, you should be able to understand what you're looking at and what it means for the children in your school.

See also: SOAP

D is for Deadline

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

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

D is for Decision

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

Decisions should not happen in isolation of each other.

Decisions can be categorised simply as;

Term	Definition	Typical Use Case	Notes
Approve	To give formal consent to a proposal, policy, or plan, making it officially valid	Approving statutory policies (e.g. Safeguarding Policy, Admissions Policy)	Indicates direct accountability for the decision
Adopt	To take on and implement a procedure, framework, or approach developed internally or externally	Adopting a code of conduct, adopting a complaints procedure, adopting sector guidance	Signals incorporation into trust practice
Ratify	To formally confirm a decision already made at another level of governance or leadership	Ratifying the appointment of a senior leader, ratifying the election of a LGB chair; trust wide policy	A safeguarding/ check mechanism; decision has been made elsewhere but requires confirmation
Resolved	A formal record that the board/trustees have agreed to an action	It was resolved to approve the annual accounts	Can substitute for “approve” in minutes; more formal in legal/charitable governance contexts.

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

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

See also: C is for Collective Responsibility

De is for De Facto Trustee (academy trusts only)

A de facto trustee is a person who has not been validly appointed as a trustee but is nevertheless exercising functions that properly belong to a trustee. Academy trusts should not have de facto trustees.

This situation may arise through an error, omission or oversight in the appointment process, for example where the required appointment process has not been followed correctly, an appointment has lapsed, or someone has simply been allowed to take on trustee-level responsibilities without being formally appointed.

Think carefully about who is attending your board meetings and why. It is not always appropriate for the whole of the senior leadership team to attend board meetings. This can be particularly common in Single Academy Trusts. Senior leaders may attend to provide information, advice or reports, but their role should be clearly distinguished from that of a trustee.

It is important to remember that someone does not become a trustee simply because they attend meetings or contribute to discussions. However, allowing someone who has not been formally appointed to make trustee-level decisions, exercise trustee powers or otherwise assume the responsibilities of a trustee can create a risk that they are regarded as a de facto trustee.

Anyone acting as a trustee or director without formal appointment may also need to satisfy the relevant eligibility and disqualification requirements. Trustees, directors and anyone who is genuinely acting in that capacity should also be subject to the appropriate requirements concerning declarations of interest and related party transactions.

Ways to reduce the risk of creating a de facto trustee

- Have a clear and documented recruitment and appointment process for trustees, and ensure that all appointments are properly authorised and recorded.

- Keep an up-to-date register of trustees/directors, including terms of office and changes in membership.
- Ensure that everyone who routinely attends board meetings has a clear purpose and remit.
- Make clear to attendees that, unless they are formally appointed trustees/directors, they are not members of the board, do not vote as trustees and do not form part of the meeting quorum.
- Ensure the chair is clear about who has trustee status and who is attending in another capacity.
- Ensure that senior leaders and other regular attendees understand the distinction between providing advice/information to the board and exercising trustee functions.
- Ensure that anyone who attends or reports to the board has read and understood the trust's governance documentation, scheme of delegation and the Academy Trust Handbook.
- Make sure minutes clearly identify trustees and other attendees, particularly where decisions are being made.
- If there is any doubt about whether an individual's appointment is valid, resolve their status promptly rather than allowing them to continue exercising trustee-level functions.
- The key principle is: people can advise and support the board without being trustees, but the trust must be careful not to allow someone who has not been validly appointed to assume the role, powers or responsibilities of a trustee.

Top Tips for Clerks

- Know who is—and who isn't—a trustee. Keep a clear record of who is attending the meeting, their role and why they are there. Before the meeting, check that all trustees are validly appointed and that attendees who are not trustees understand that they cannot vote or count towards the quorum.
- If someone appears to be taking on trustee-level responsibilities without formal appointment, flag it to the chair early. It is much easier to prevent a de facto trustee situation than to untangle one afterwards.

D is for Delegate

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

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

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

Delegation when done properly supports distributed leadership and succession planning.

You can delegate responsibility but not accountability. Discuss!

D is for Delegated Powers

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

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

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

D is for Disaster Recovery Plan

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

Top Tip

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

D is for Distributed Leadership

As mentioned above, it is good practice to ensure that tasks, responsibilities and actions are distributed across the whole board. If there are committees, these can and should be chaired by people other than the chair of the board where appropriate.

Distributing leadership helps with succession planning, shares the workload across the board and creates a more transparent and sustainable approach to governance.

As a new governor, you may not want to chair a committee straight away — and that's absolutely fine. However, do keep the role in mind as you grow in confidence and experience. Taking on additional responsibility can be a valuable way to develop your governance skills and contribute to the wider effectiveness of the board.

Part of effective distributed leadership is ensuring you have an effective succession plan in place. In an academy trust, consider whether there would be a significant risk if the CEO, CFO or another key leader were unexpectedly absent. Is this reflected on the trust's risk register? Are there clear arrangements for interim leadership and sufficient capacity within the organisation?

Distributed leadership:

- Builds capacity throughout the school, trust and governance board;
- Encourages open-mindedness and innovation;
- Reduces an over-reliance on top-down leadership;
- Supports effective succession planning;
- Distributes and reduces workload;
- Develops future leaders; and
- Supports sustainable and resilient organisational growth.

What's not to like?!

See also: C is for Committee

D is for Diversity

*'Governors and clerks have a significant role in creating and maintaining an inclusive organisation where all can work, learn and reach their full potential.'*¹¹ Think about your own board and ask, 'is it diverse' and how do you know? If you are a member of the National Governance Association they have published some useful documents. Other organisations who can help are The National Black Governors Network, [Diverse Educators](#), and this [article](#) gives a corporate governance perspective.

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

¹¹ [Equality and Diversity and Governance.pdf \(aoc.co.uk\)](#)

D is for Due Diligence

If your school is considering joining an academy trust, you will hear the term "due diligence" used a lot. Due diligence is about undertaking a systematic investigation into all aspects of the school, including finance, governance, data, assets, staffing, and any legal liabilities.

Trusts undertake due diligence on schools – but it is good practice for a school thinking of joining a trust to do a little due diligence of their own. Ask questions. Visit other schools in the trust. Talk to their headteachers and governors. Understand the trust's culture, values, and track record. Don't just accept what you're told in the glossy brochure.

For trustees: capacity and funding

If your trust is growing or considering taking on new schools, you need to ensure that:

- You have the capacity in your central team to undertake thorough due diligence. Due diligence is time-consuming and resource-intensive. If your finance, HR, estates, and governance teams are already stretched, taking on a new school without adequate capacity is a risk.
- You understand that there is no longer any DfE funding for conversions. The government stopped providing conversion grants in [insert year if known, or say "recent years"]. This means the trust must fund the costs of due diligence, legal fees, and integration from its own resources. Make sure you've budgeted for this and that it's affordable.

Due diligence isn't just a tick-box exercise. It's about understanding the risks, opportunities, and realities of bringing a new school into the trust – and making sure you have the capacity and resources to do it well.

Questions to ask

1. For schools considering joining a trust:
2. What due diligence is the trust carrying out on us, and what will they be looking at?
3. What due diligence should we be doing on the trust?
4. What are the financial, legal, and operational implications of joining this trust?
5. What will change for our school, our staff, and our pupils?

For trustees considering taking on a new school:

1. Does this school align with our trust's vision, values, and strategic priorities?
2. Do we have the capacity in our central team to undertake thorough due diligence and support the integration of a new school?
3. Have we budgeted for the costs of due diligence, legal fees, and conversion (remembering there is no DfE funding anymore)?
4. What are the financial, governance, safeguarding, estates, and HR risks, and how will we mitigate them?
5. Are we taking on this school for the right reasons – to improve outcomes for children – or are we being driven by growth targets or external pressure?

Top Tips

- Research more than one trust. This is not a popularity contest or a beauty parade, and you shouldn't just go with the first trust that approaches you or the one your neighbouring school joined. Do your homework. Compare trusts. Understand their vision, values, track record, and capacity to support your school. Make an informed choice.
- Use expert external advice – it's worth the investment. Due diligence is complex, and the stakes are high. Consider commissioning independent legal, financial, or governance advice to help you

understand the implications and ask the right questions. Do some research first to find advisors with a good track record in academy conversions.

- Pace yourselves – these things are rarely quick! Due diligence and conversion can take months (sometimes over a year). Don't rush. Take the time to get it right. If a trust is pressuring you to move faster than you're comfortable with, that's a red flag. Actually, the best advice the Glossary can give is don't rush!

D is for Duplication

This is another new entry in the Glossary because SBW Governance sees a lot of duplication going on!

Duplication in governance should be avoided wherever possible, as it creates confusion about accountability, increases workload unnecessarily, and can blur the lines of responsibility.

Duplication across governance layers

In multi-academy trusts, there are multiple layers of governance: members, the board of trustees, and often local governing bodies (LGBs). Local governors have no powers except those delegated to them by the board of trustees and are not trustees unless they also sit on the trust's board.

Individuals should not typically serve on more than one layer of governance within the same trust structure, as this creates conflicts of interest and undermines the accountability chain. For example:

- A trustee should not also sit on an LGB within the same trust
- An LGB member should not also be a member of the trust

The main exception is the chair of trustees serving as a member, if the articles of association allow this. However, even this should be carefully considered to ensure proper separation of oversight and accountability.

Duplication of effort and reporting

Duplication also occurs when the same information is requested, discussed, or reported multiple times across different governance layers or committees without clear purpose. This:

- Wastes valuable time for both school leaders and governors/trustees
- Creates unnecessary workload for staff who must prepare multiple reports or present the same information to multiple meetings
- Confuses lines of accountability - if everyone is looking at everything, no one is truly accountable for specific areas
- Dilutes strategic focus, as boards become bogged down in operational detail

Avoiding duplication

To avoid duplication:

- Ensure your scheme of delegation clearly sets out which decisions and monitoring responsibilities sit at which level
- Use committee terms of reference to define distinct areas of focus for each committee
- Establish clear reporting lines so information flows efficiently without repetition
- Trust the work of committees and LGBs - the full board doesn't need to repeat detailed scrutiny that's been delegated
- Be disciplined about what information the board needs versus what committees or LGBs should handle

Remember: effective governance is about the right people looking at the right things at the right time - not everyone looking at everything all the time.

D is for Dysfunctional (sadly)

Drawing on Patrick Lencioni's¹² model of a dysfunctional team it is interesting to consider what dysfunctional governance looks like.

Lencioni identifies five dysfunctions that build on each other:

1. Absence of trust – people don't feel able to admit mistakes, ask for help or challenge assumptions.
2. Fear of conflict – difficult issues are avoided and meetings become polite but pointless.
3. Lack of commitment – decisions are unclear, repeatedly revisited or simply don't stick.
4. Avoidance of accountability – people aren't challenged when actions aren't completed or performance falls short.
5. Inattention to results – individual agendas, processes or activity take priority over outcomes for pupils.

What might this look like in a board meeting?

- The polite dysfunction: Everyone is very nice, the cake is lovely, nobody disagrees and nothing changes.
- The chaotic dysfunction: People talk over each other, meetings overrun, arguments repeat and decisions are constantly revisited.
- The compliance dysfunction: Papers are noted, questions are asked because they "should" be asked, and everyone goes through the motions without considering impact.
- The power-play dysfunction: One or two voices dominate, factions develop and trust between the board and executive breaks down.

A useful governance health check: Ask yourself: are we on TRACC?

- Trust: Can people admit they don't understand or have made a mistake?
- Results: Is the board focused on outcomes for pupils?
- Accountability: Are governors willing to challenge each other?
- Conflict: Are difficult issues genuinely debated?
- Commitment: Are decisions clear and do they stick?

A healthy board isn't one where everyone agrees. It is one where people can disagree well, reach clear decisions and work together to achieve the best outcomes for pupils.

E is for Early Help

Early help means providing support as soon as a problem emerges at any point in a child's life, from the foundation years through to the teenage years – and is not just about your early years foundation stage (EYFS) cohort. There is a whole section on Early Help in *Working Together to Safeguard Children* guidance.

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

Why early help matters

¹² **The Five Dysfunctions of a Team** is a business book by consultant and speaker [Patrick Lencioni](#) first published in 2002. It describes many pitfalls that teams face as they seek to "grow together"

Early help is about intervening **before** problems escalate to the point where statutory intervention (such as social care involvement) becomes necessary. It's about:

- Identifying needs early – spotting when a child or family is struggling
- Acting quickly – providing support before problems become entrenched
- Working with families – building on strengths and supporting resilience
- Preventing escalation – reducing the likelihood that children will need more intensive (and more costly) statutory services later

Early help can include support with:

- Parenting and family relationships
- Mental health and wellbeing
- Attendance and engagement with school
- Housing, finances, or employment issues
- Domestic abuse, substance misuse, or other family difficulties
- Special educational needs or disabilities

Questions to ask

1. How do we identify children and families who may benefit from early help? What are the signs staff look out for?
2. How quickly do we respond when a need is identified? What's the process for referring families to early help?
3. How many early help assessments or referrals have we made this term/year? Are there any patterns or trends?

E is for Effectiveness

Effectiveness is tested by self-review, self-evaluation, and self-reflection. Ensuring that our meetings are effective meetings is really important – 3 hours spent discussing the colour of the walls in the school hall is not the most effective use of anyone's time. There are lots of toolkits available to help boards self-reflect on their effectiveness – a quick internet search will help, plus there are templates and toolkits available from subscription sites like Governor Hub and The Key for Governors.

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

Top Tip for Clerks:

meetings focused on **impact, not just activity**. If a discussion is taking too long or drifting away from what matters, don't be afraid to flag it to the chair. A good agenda should help the board spend its time on the things that make the biggest difference to pupils.

E is for Elective Home Education (EHE)

Elective Home Education (EHE) is when parents choose to educate their child at home rather than at school. Parents generally have a legal right to do this without the school's or local authority's permission.

Where a child is already on the school roll, parents should notify the school in writing. The school must follow the legal requirements for removing the child from the admission register and notifying the local authority. Different rules apply to children registered at special schools, where local authority consent is required.

Safeguarding and KCSIE 2026

KCSIE 2026, in force from 1 September 2026, highlights the need for schools and local authorities to consider the safeguarding implications when a child moves to EHE.

Schools should be alert to EHE being used to avoid exclusion, conceal poor attendance or as a result of school pressure (off-rolling). Where a child is vulnerable, has SEND/a disability, an EHC plan or a social worker, schools and the local authority should work together and, where possible, coordinate a meeting with the family.

The Children's Wellbeing and Schools Act 2026 also introduces significant changes relating to children educated otherwise than at school, including Children Not in School registers and new requirements in certain circumstances. Schools should follow the latest DfE and local authority guidance as these provisions come into force.

Questions for governors

1. How many pupils have moved to elective home education this year, and why? Are there any patterns or trends – for example, particular year groups, SEND pupils, pupils at risk of exclusion, or pupils with attendance concerns?
2. What is our process when a parent expresses an intention to home educate? How do we ensure the decision is genuinely the parent's informed choice and not the result of pressure from the school? Do we follow the legal requirements for deletion from the admission register and notification of the local authority?
3. How do we respond when safeguarding or vulnerability concerns are present? Do we work appropriately with the local authority and other professionals, and consider whether a meeting with the family would be appropriate?
4. How do we identify and respond to possible off-rolling? Are any pupils being encouraged, explicitly or implicitly, to leave school for EHE in circumstances where this would not be in their best interests?
5. How do we work with the local authority when a child moves to EHE? Are relevant safeguarding and education concerns being shared appropriately, particularly where the child has SEND, a disability, a social worker or other vulnerabilities?

Key guidance

- [DfE: Elective home education guidance](#)
- [DfE: Children Missing Education \(CME\) statutory guidance](#)
- [DfE: Keeping Children Safe in Education \(KCSIE\) 2026](#)
- [Children's Wellbeing and Schools Act 2026](#)

See also: O is for Off-rolling, A is for Attendance, E is for Exclusion,

Remember: is it always okay to be curious but don't stray into the operational.

E is for Enrichment Benchmarks (new from June 2026)

The new document sets out eight non-statutory enrichment benchmarks designed to help schools and colleges evaluate and strengthen their enrichment offer. They provide a clear structure for self-assessment, improvement planning, and strategic alignment, but they are *not* statutory requirements. Settings are encouraged to adapt them to their own context, needs, and priorities.

The Eight Enrichment Benchmarks

1. A strategically aligned enrichment offer Enrichment is intentionally connected to the school or college's vision, values, curriculum intent, and development priorities. Leadership and governance explicitly support and monitor it.
2. A broad and well-rounded enrichment offer Every pupil/student should access activities across *five core categories*:

- Civic engagement
 - Arts and culture
 - Nature, outdoors and adventure
 - Sport and physical activity
 - Wider life and future skills Provision should be regular, varied and partly delivered within the school/college day.
3. A well-communicated enrichment offer that celebrates participation and achievement Information is clear and accessible; expectations are high; participation and achievement are recognised through awards, reports, assemblies, and reflection activities.
 4. An enrichment offer shaped by the school or college community pupil/student voice, parent feedback, staff expertise, and local context shape the design and delivery of enrichment. Leadership opportunities for pupils/students are encouraged.
 5. An accessible and engaging enrichment offer Enrichment is equitable and inclusive, with barriers identified and removed—particularly for disadvantaged pupils, those with SEND, young carers, care-experienced pupils, and those at risk of persistent absence.
 6. An enrichment offer that works in partnership Schools and colleges collaborate with external organisations (cultural, sporting, community, employers, FE/HE, voluntary sector) to broaden opportunities and enhance quality.
 7. An outcomes-focused enrichment offer Enrichment is designed with clear intended outcomes (wellbeing, belonging, essential skills, engagement, progression) and tracked through appropriate systems.
 8. A continually improving enrichment offer Feedback from pupils/students, parents, staff, and partners informs ongoing refinement. Participation data, quality indicators, and impact measures are reviewed regularly.

The benchmarks are intended to support reflection, planning and improvement, not to impose mandatory expectations.

Five Strategic Questions for Governors and Trustee;

These are designed to support oversight, challenge and assurance at board or committee level; and many boards are already asking this type of question:

1. How clearly is our enrichment offer aligned to our strategic priorities (attendance, behaviour, wellbeing, curriculum intent, careers)? What evidence demonstrates this alignment?
2. Do all pupils—including disadvantaged learners and those with SEND—access enrichment equitably? What does our participation data show, and how are barriers being addressed?
3. Does our enrichment offer sufficiently broad across the five categories, and does it run regularly throughout the year? Where are the gaps, and what is our plan to strengthen them?
4. How do we know enrichment is making a difference? What outcomes are we tracking (belonging, wellbeing, essential skills, progression), and what trends are emerging?
5. How effectively do we use pupil voice, staff expertise, and external partnerships to shape and improve our offer? What feedback loops exist, and how is this informing continuous improvement?

Top Tip

Focus on *alignment and equity first*. The benchmarks are broad and ambitious, but the most powerful lever for governance is ensuring the enrichment offer is strategically aligned to your trust or school's priorities *and* equitably accessed by all pupils. If you concentrate your challenge on those two areas, everything else becomes more purposeful and measurable

Unfortunately there is no money attached to the new benchmarks.

E is for Equality and Equity

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

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

- *The framework is intended to be a force for improvement for all learners. The framework and remit-specific criteria are clear that the expectation is that all learners will receive a high-quality, ambitious education.*
- *Inspectors will assess the extent to which the provider complies with the relevant legal duties as set out in the Equality Act 2010, including, where relevant, the Public Sector Equality Duty and the Human Rights Act 1998.*

Remember to always consider the 9 protected characteristics;

- Age
- Disability
- Gender reassignment
- Marriage and civil partnership
- Pregnancy and maternity
- Race
- Religion or belief
- Sex
- Sexual orientation

E is for Estates

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

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

The DfE expects academy trusts to manage their school estate strategically and effectively and maintain their estate in a safe working condition and has produced specific guidance – called ‘*School estate management standards Policies and processes required to manage the school estate effectively*’ dated April 2025¹³.

Good Estates Management for Schools [GEMS](#)

The GEMS guidance offers useful information and a range of hyperlinked tool kits on the following areas; as governors and trustees it is good to have some understanding of estates management so we can ensure that we ask probing and relevant questions;

- Fundamentals of good estate management - an overview of the important policies, processes and documents schools should have.
- Tools and checklists to help schools and responsible bodies manage their school buildings and land.
- Strategic estate management a range of policies, governance arrangements, and documents to help you manage your estate to meet your educational aims and align with your other strategies.

¹³ [School estate management standards](#) further links to key documents are available in the ATH 2025 – para 1.20 onwards

- Planning and organising your estate resources advice on governance, budgeting, procurement, and emergency planning procedures to help you manage your estate.
- Understanding and managing your land and buildings – useful information you should have about your estate, how to use it effectively and when to update it.
- Sustainability of your estate information on how to improve sustainability and managing energy and water use.
- Digital technology in your estate - digital technology requirements alongside your school estate management.
- Maintaining your estate – how to plan and prioritise maintenance works to ensure the learning environment is safe, warm, and weatherproof.
- Health and safety - advice on legal responsibilities for managing and maintaining the school estate and ensuring school buildings and land are compliant with statutory and regulatory standards.

This is an interesting blog: [What the DfE Estates Strategy Actually Requires — and What It Does Not Say](#) – may be reading it will generate some questions for you to ask? You may also find this insight document interesting too [The Four Documents That Now Govern Every Education Estate in England](#)

Top Tip

Whilst having an estates or H&S named governor or trustee is not essential it is increasingly good practice to have someone on the board with oversight of this key area.

E is for Ethical Leadership

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

E is for Ethos

In trusts, the purpose of governance is to provide:

- Strategic leadership
- Accountability and assurance
- Strategic engagement

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

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

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

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

Top Tips

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

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

E is for Exclusion – Please note this now referred to as school suspensions and permanent exclusions.

It is essential that procedures for suspensions and permanent exclusions are followed precisely. The Department for Education's statutory guidance on *School Suspensions and Permanent Exclusions* is mandatory, not optional. It makes clear that any decision to suspend or permanently exclude a pupil must be lawful, reasonable, and fair. Schools also have a statutory duty not to discriminate against pupils on the basis of protected characteristics, such as disability or race, and should give particular consideration to the fair treatment of pupils who are more vulnerable to exclusion.

While the management of behaviour is an operational responsibility for the headteacher and senior leadership team, governing boards have a statutory role in reviewing certain suspension and exclusion decisions. Governors do not decide whether to exclude a pupil, but they must consider whether the headteacher's decision was lawful, reasonable, fair, and procedurally correct, and decide whether it should be upheld or the pupil reinstated. This is one of the most significant responsibilities of a governing board, as it can have a profound impact on a child's education and on the relationship between the board and school leaders.

Clerks play a vital role by ensuring statutory procedures and timescales are followed, arranging review meetings, maintaining accurate records, and communicating decisions appropriately. It is also essential that governors have read, understood, and discussed the school's Behaviour Policy before approving it, as this policy underpins decisions relating to suspensions and permanent exclusions.

Top Tip

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

Internal exclusion can be an appropriate short-term response to serious or disruptive behaviour, but governors should be assured that it is being used proportionately, consistently and for the minimum time necessary. This is an interesting opinion piece [‘Internal exclusion’ of England secondary school students](#)

Key question: What does our internal exclusion data tell us about which children we are removing from learning, why we are removing them, and whether our approach is actually improving behaviour — particularly for disadvantaged pupils and pupils with SEND — and how do we know that internal exclusion is being used as a proportionate, time-limited intervention rather than becoming an invisible form of exclusion?

E is for External Review

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

- External reviews of governance
- Pupil premium reviews
- Teaching and learning reviews
- Special education needs and disability reviews
- Early years reviews
- Safeguarding and other audits
- Financial audits, one example is this about finance and governance.

This is not an exclusive list. External reviews should be led by people outside the school or academy and are a good way of assessing effectiveness and can be commissioned by the board at any point. There are a range

of reviewers including the NGA, CST, and your Local Authority and well as a range of highly experienced individuals.

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

- what you hope to get out of the review
- how much you are willing to spend
- the timescale and capacity
- who else needs to see the outcomes of the review

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

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

Do get in touch with SBW Governance if you would like to have a chat about having an ERG. We are always happy to talk.

E is for Evidence

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

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

Top Tip

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

See also: R for Reliable

E is for Extra Curricular

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

Questions governors could ask:

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

Finding out about the whole of the school day is really important. Ask about trips, clubs, excursions, sporting activities, music events etc; and always ask how and if the disadvantaged¹⁴ and SEND pupils are accessing these activities.

If you attend these trips and events yourself in any capacity remember they are not governance visits per se but a fantastic way to listen to pupil voice and share in the life of the school.

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



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

F is for Federation

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

F is for Feedback

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

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

Some good practice in giving visit feedback;

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

Remember...

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

¹⁴ There must be a better word than this!

F is for Finance

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

Stay strategic

It is really important that governors and trustees remain strategic when discussing finance and leave the detailed operation and management of the budget to the headteacher and school business leaders – although you do need to understand the 'nitty gritty.' Balance is everything and asking questions about finance is part of discharging the third core function of governance.

Ask yourself – on a scale of 1 to 10, how strategic was your last meeting? Now, keep track of this throughout the year.

Finance policies and delegation

It is really important that governors and trustees remain strategic when discussing finance and leave the detailed operation and management of the budget to the Headteacher and School Business Leaders; although that you do need to understand the 'nitty gritty.' Balance is everything and asking questions about finance is part of discharging the third core function of governance. Ask yourself – on a scale of 1 to 10 how strategic was your last meeting? Now, keep track of this throughout the year.

There are a number of finance policies which are mandatory and which governors and trustees need to read, review, and ratify on a regular basis. Some of these policies can be delegated to committees and some cannot. It is always best to check with the clerk.

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

If you are a local academy committee or local governing body – check your Scheme of Delegation. Not all trusts delegate finance to local level. However, you should still be asking questions about the impact of the budget on outcomes, staffing, and how the school uses external funds such as pupil premium.

Benchmarking

You may also like to consider benchmarking your school against similar schools. If you do this well, you may well save money, and even if it doesn't, it will give you some good questions to ask. Benchmarking is not a solution in itself but is a tool in your governance armoury and offers a good place to start shaping and focusing your lines of enquiry.

Finance meetings and minutes

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

Your statutory requirements

- **Maintained schools:** You have to complete the Schools Financial Value Standard, which is an audit tool and can be found on the DfE website.
- **Academies:** You have to follow the financial reporting requirements set out in the Academy Trust Handbook.

Understanding school funding

It is important to understand how your school or trust is funded. Schools get two main streams of money from the government:

- Revenue funding – this is the core funding spent on running costs, like salaries
- Capital funding – this is for buildings and major works (see B is for Budget)

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

Novel and contentious transactions

Some additional definitions that you might find useful:

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

Questions governors should ask about finance

1. How does our spending align with our strategic priorities?
2. What is the impact of our spending on pupil outcomes?
3. Are we getting value for money?
4. What are the financial risks facing the school/trust, and how are we mitigating them?
5. How does our spending compare to similar schools (benchmarking)?
6. Are we complying with all our financial regulations and requirements?
7. Do we have adequate reserves, and what are they for?

See also: A is for Audit, B is for Budget, S is for Scheme of Delegation

F is for Fit and Proper Person

This is yet another new entry into the Glossary and something which is becoming increasingly important.

All governors and trustees must be able to demonstrate that they are “fit and proper persons” to govern. This is not just a formality: it is a fundamental safeguarding requirement and a condition of board membership. The board has a legal duty to make sure every member meets this standard when they are appointed and continues to meet it throughout their term of office.

What makes someone fit and proper?

To be fit and proper, you must:

- Have an enhanced DBS check (with barred list check for those working in regulated activity)
- Not be disqualified from being a governor or trustee under the relevant legislation
- Not be prohibited from teaching (if you're a teacher governor)
- Not be bankrupt or subject to certain insolvency arrangements
- Not have been removed from trusteeship of a charity by the Charity Commission

In academies, there are additional checks required under the Academy Trust Handbook, including:

- Identity checks
- Right to work in the UK checks
- Section 128 direction checks (for trustees and those in management positions)

- Overseas criminal records checks (where applicable)

The board's responsibility

The board must:

- Carry out all required checks before appointing a new governor or trustee
- Keep a Single Central Record (SCR) of all checks carried out; it is not the governor or trustee role to check the details on the SCR but to ensure that it is compliant with all requirements
- Review the fit and proper person status of all governors and trustees annually
- Act immediately if someone becomes disqualified or no longer meets the requirements

The chair of the board is responsible for ensuring that checks are carried out on all governors and trustees. In academies, the chair of the trust board must also ensure their own checks are completed and recorded.

What happens if someone is not fit and proper?

If a governor or trustee is found to be disqualified or no longer meets the fit and proper person requirements, they must be removed from the board immediately. There is no discretion in this – it is a legal requirement.

If someone fails to disclose information that would have made them ineligible, or if they become disqualified during their time in post, they must step down immediately and inform the board.

The Code of Conduct

The Code of Conduct should make it clear that all governors and trustees are expected to meet the fit and proper person requirements and to disclose anything that might affect their eligibility. It should also set out the consequences of failing to do so.

Being fit and proper is not just about passing checks – it's also about demonstrating integrity, honesty, and a commitment to safeguarding. Your behaviour, both in and out of governance, should reflect the high standards expected of those who govern schools.

See also: C is for Code of Conduct, S is for Safeguarding,

F is for Fluency

Governance fluency is not about being able to speak a modern foreign language fluently but about the ebb and flow, the warp and weft, the iteration between your meetings. Making sure that there is clear transition and links between your meetings so that they do not sit in splendid isolation from each other is important. The Governance Professional comes into their own in this space – making links between meetings and decisions, between policies and compliance requirements and between the beginning and the end of the agenda plan. Fluent governance looks round corners, makes connections, and ensures that today's decisions inform tomorrow's actions.

Fluent governance means that when you discuss pupil outcomes in the autumn term, you're already thinking about how this will inform budget decisions in the spring term. It also means that actions from one meeting are tracked, followed up, and reported back - not lost in the void.

What does fluency look like in practice?

Some practical ways to support fluency are:

- Read the previous meeting's minutes before the next meeting
- Check the action log and ask, "what happened to...?"
- Make connections between agenda items

- Think about the "golden thread" running through the year

What does lack of fluency look like? The warning signs

- Discussing the same issue repeatedly without progress
- Decisions being made without reference to previous discussions
- Policies being approved without understanding how they connect to strategy
- Actions that are never followed up

Think about what your meetings feel like? Do they make 'sense' when you step back?

See also: C is for Cadence

F is for Forest Schools

Forest Schools is an outdoor learning approach that gives children regular opportunities to explore, play, and learn in natural environments like woodlands. It's about building confidence, resilience, and a connection to nature through hands-on, child-led experiences – not just a one-off trip to the woods. If your school offers Forest Schools, ask how it supports the curriculum, which pupils are accessing it, and what impact it's having on their development and wellbeing.

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

If you are governing in a church school a number of the governors will be Foundation Governors appointed by the Diocese or local parish. They are the same as the other governors in every way but they have to ensure that the ethos and values of the church are celebrated, shared, and monitored.

The number of Foundation Governors is carefully prescribed in the Instrument of Government or Articles of Association. In a VA school the chair should be a Foundation Governor unless there are very compelling reasons why this cannot be the case. Always seek advice from the clerk or Diocese.

F is for Freedom of Information (FOI) and Subject Access Requests (SARs)

This is a big subject, so the Glossary only covers the basics. Always seek expert advice if you are unsure.

FOI gives anyone the right to request information held by a school or academy trust. Requests must normally be answered within 20 working days.

SARs give individuals the right to access the personal data held about them. These must normally be answered within one calendar month, although extensions can apply to complex requests.

The two are different: FOI is about information; SARs are about someone's personal data.

Governors and trustees should not normally deal with these requests themselves. The school, trust, clerk or Data Protection Officer should have a clear process for receiving, logging and responding to them.

A good Publication Scheme and accessible website can also reduce unnecessary FOI requests by making information publicly available.

Why FOI and SARs matter for governance

Both FOI and SARs are about transparency, accountability, and respecting people's rights – all core principles of good governance. The public has a right to know how schools are run, and individuals have a right to access their own personal data. As a governor or trustee, you should support a culture of openness and make sure your school or trust is meeting its legal obligations.

Top Tip

If you receive an FOI or SAR directly, pass it on immediately to the appropriate person. Don't try to deal with it yourself.

See also: T is for Transparency, G is for GDPR, D is for Data Protection.

F is for Funding Agreement

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

The agreement sets out the funding arrangements, obligations, and termination provisions. It is unlikely that this agreement will come up at meetings often but if it does it is important to pay attention.

F is for Further Education

If you are a governor at an FE college there is lots of useful information on the Association of Colleges website such as these [research documents](#). If you clerk in the FE sector the AOC has some really useful resources which you can download and save.

G is for GAG

GAG (General Annual Grant) is the core funding an academy trust receives from the Education and Skills Funding Agency (ESFA) for its schools. Trusts can choose how this funding is allocated and managed across the trust, within the requirements of the funding agreement and relevant guidance.

GAG pooling is when an academy trust holds schools' GAG centrally and allocates funding to schools based on the trust's agreed funding approach, rather than each school retaining and controlling its own full GAG allocation. This can allow the trust to direct funding to where it is most needed.

Top-slicing is when schools within a trust keep and control most of their own GAG funding, with central services funded by a small proportion of each school's GAG. GAG pooling is different: the trust holds GAG centrally and delegates smaller amounts of funding to schools to control.

Why trusts choose GAG pooling:

- To target funding where it is needed most, based on cost rather than pupil numbers. Exploring GAG pooling as an alternative to top-slicing
- To support schools with falling rolls or financial pressures.
- To enable strategic deployment of resources (e.g. placing experienced teachers in schools causing concern).
- To drive school improvement through targeted investment.

The term 'GAG pooling' has attracted criticism in the press, with suggestions that it can imply trusts are taking away individual schools' financial autonomy. Some trusts prefer terms such as 'targeted GAG' or 'focused GAG' to clarify that funding is being targeted where it can have the greatest impact. Some call it the trust dividend or trust share.

Transparency is key. Maintaining transparency around budget setting can help address negative perceptions. Trusts should make sure that the budget-setting strategy is clearly communicated with stakeholders, share documentation showing cost comparisons, and make clear what impact the trust is having on school improvement.

The 2026 ATH requires that trusts **must** publish on their website a summary statement (by 31 January) accompanying the trust's annual accounts, outlining how funds are distributed across their schools. This is a new requirement.

Questions to ask:

1. How does our trust allocate funding to schools, and is this transparent and fair?
2. How do we ensure that schools causing concern receive the resources they need?
3. How do we communicate our funding model to stakeholders?

G is for GDPR

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

Remember you do not ever need to see any document with pupil names on it – this includes in the Headteacher's Report to Governors, data tables and link reports referring to pupil voice. The only exceptions are when you're sitting on a disciplinary panel or exclusion review panel, where you need to see names to make decisions. You should never see individual grades or personal data such as staff salaries.

Top Tips

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

G is for Get Information About Schools (GIAS)

GIAS used to be called Edubase. Once you are a governor (or trustee) your name will be published on this [website](#). Governing is a responsible role and so we should know who is doing this important job. If you are a Trustee your details will also be published on the Companies House website as well. GIAS requires the name of the chair of the board to be identified and you can now add the name of the Governance Professional (although this is not mandatory at the moment).

Other details needed are governor and trustee details which should include your name, appointment date, term of office end date, and any roles you hold (e.g., chair, safeguarding governor). Remember it is not the role of the governors or trustees to make the changes to the website – this is the role of the school or trust – but it is our responsibility to make sure details published are correct and as up to date as possible.

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

G is for Gifts and Hospitality

As a governor or trustee, you are a custodian of public money and public trust. This means you need to be squeaky clean when it comes to gifts, hospitality, and any financial dealings with the school or trust. The rules exist to protect you, the school, and the integrity of governance – and to make sure no one can ever question whether a decision was influenced by a nice lunch or a bottle of wine.

The golden rule: declare everything

If in doubt, declare it. Your school or trust should have a gifts and hospitality policy (often part of the Code of Conduct) that sets out what you can and cannot accept, and what you must declare. Read it. Follow it. And if you're not sure, ask.

What counts as a gift or hospitality?

Gifts and hospitality can include:

- Physical gifts (flowers, chocolates, bottles of wine, vouchers)

- Meals, drinks, or entertainment (lunch with a supplier, tickets to an event)
- Discounts or preferential rates on goods or services
- Travel or accommodation paid for by a third party
- Invitations to conferences, training, or events paid for by an external organisation

What you should (and shouldn't) accept

Generally acceptable:

- Token gifts of low value (e.g., a box of chocolates at Christmas from a parent)
- Hospitality that is part of a legitimate business meeting (e.g., lunch during a conference)
- Gifts given to the school (not to you personally) that benefit pupils

Generally, not acceptable:

- Gifts or hospitality from suppliers, contractors, or anyone seeking to do business with the school
- Cash or cash equivalents (vouchers, gift cards)
- Anything that could be seen as an attempt to influence your decisions
- Anything of significant value (your policy should set a threshold – often around £25-£50)

When in doubt, politely decline. You can say, *"Thank you, but as a governor I'm not able to accept gifts. However, I'd be happy for you to donate this to the school for the benefit of the pupils."*

The register of gifts and hospitality

Your school or trust should maintain a register of gifts and hospitality, where all declarations are recorded. This should be reviewed regularly by the board and made available for inspection (it may be published on your website as part of your transparency requirements).

Note: If you receive or are offered a gift or hospitality, you **must** declare it – even if you decline it. This creates a clear audit trail and protects you from any suggestion of impropriety.

Expenses policy

Governors and trustees should not be out of pocket for carrying out their role. Your school or trust should have an expenses policy that sets out what you can claim for, such as:

- Travel costs (mileage, public transport)
- Childcare or care costs to enable you to attend meetings
- Other reasonable expenses (e.g., printing, postage if you don't have access to school facilities; attendance at governance conferences – always ask first and do not assume that the school or trust will pay)

What you cannot claim:

- Loss of earnings (governance is a voluntary role)
- Attendance at social events that are not part of your governance duties
- Anything that is not pre-approved or covered by the expenses policy

Make sure you submit expenses claims promptly, with receipts, and in line with the policy. Expenses should be reviewed and approved by someone other than the claimant (usually the headteacher or chair).

Why this matters

Public trust in governance depends on transparency and integrity. If it looks like you're benefiting personally from your role as a governor or trustee – even if you're not – it damages the reputation of the board and the school.

The "front page of the local newspaper" test applies here: if your gift, hospitality, or business dealing with the school appeared on the front page of the local paper tomorrow, would you feel comfortable defending it? If the answer is no, don't do it.

Top Tips

- Read your Code of Conduct and gifts and hospitality policy. Know the rules
- Always seek advice if you are not sure
- Declare everything. Even if you think it's too small to matter, declare it.
- Keep it transparent. Make sure the register of gifts and hospitality is up to date and reviewed regularly.
- Avoid conflicts of interest. If you have a business or family connection that could create a related party transaction, declare it, and recuse yourself from any decision-making.
- Think about perception. Even if something is technically allowed, ask yourself: *how would this look to a parent, a member of staff, or the local community?*

See also: C is for Code of Conduct, C is for Conflicts and Declarations of Interest, R is for Register of Business Interests (if you have it)

G is for (own) Goal

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

- Ensure the meetings are quorate, agree dates in advance, and if you cannot attend let someone know as soon as possible as meetings can often be re-arranged.
- Make sure you get your papers on time from the clerk. If they do not arrive within 7-10 days of the meeting – say something. Please note that there may be a reason for the delay that is beyond the clerk's control.
- Having to read 20+ policies at once is not good practice and lots of schools use a spreadsheet-style management system.
- Ensure that the terms of office for governors do not expire without you noticing – keep a check of the date you started in case everyone else forgets, sadly this happens. Also keep a record of the date you do any safeguarding training for the same reason.
- Make sure your minutes are accurate and reflect your discussions and read them as soon as they are sent to you. If you disagree with the minutes please discuss this respectfully.
- Do not get hung up on a missing comma but rather focus on ensuring that the decisions are correct and the actions are attributed correctly.
- Be clear on your role and remit. Focus on strategic oversight rather than operational detail. If a discussion drifts into day-to-day management, politely steer it back to the board's role.
- Prepare and ask strategic questions. Before meetings, review papers and think about key areas of challenge, risk, and impact. Asking informed questions helps avoid rubber-stamping and demonstrates active governance.

Top Tip

Try to avoid too many own goals!

G is for Going Concern

Academy Trusts

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

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

Maintained Schools

In a maintained school, being a going concern means:

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

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

Budgets are increasingly under pressure and some maintained schools find themselves in a deficit budget position. In this situation they may be able to agree a licensed deficit. A licensed deficit is a formal agreement between a maintained school and its local authority that allows the school to operate with a planned budget deficit under strict conditions. Such a situation will bring additional scrutiny from the local authority. Governors must ensure that all finance meetings are properly clerked and that accurate records are kept of all decisions and actions

Key features include:

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

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

G is for Governor

The word “governor” can be quite confusing these days! What you are called depends on the type of school and the governance structure.

In a maintained school, the members of the governing body are generally called governors. In an academy, those involved in governance at school or local level may be called governors, committee members, representatives, advisers or councillors. At trust level, governance sits with the trust board, whose members are trustees/directors.

The three-layered cake

Think of academy governance as a three-layered cake:

- Bottom layer: the local/school level
- Middle layer: the trust board
- Top layer: the Members

Each layer has different roles and responsibilities. There may be some overlap between the people involved, but the DfE expects clear separation of roles and responsibilities. Check your Articles of Association and Scheme of Delegation to understand who does what and where decisions are made.

Some trusts no longer have Local Governing Boards and use different structures. Know your structure, know where decisions are made and know where you fit.

In maintained schools, the constitution of the governing body is set out in the Instrument of Government. In academy trusts, the Articles of Association and Scheme of Delegation set out the relevant arrangements.

Some governors are elected, such as staff and parent governors, while others are appointed, such as co-opted and foundation governors. The constitution will set out how your governing body or local governance structure is made up.

Whether you are appointed or elected, all governors are equal members of the governing body.

And sometimes it is important to state the obvious:

- A parent governor can serve on a performance appraisal panel and should not be asked to leave a board meeting simply because they are a parent, unless there is a genuine reason such as a conflict of interest.
- A staff governor should not sit on the headteacher's performance management panel simply because they are a governor.
- A School Business Manager who is also a staff governor should not automatically chair the resources committee or take the minutes simply because they know the most about finance.

If you find yourself in a situation that doesn't feel right, ask the clerk or governance professional for advice.

And remember you can be a governor — or indeed a trustee — at more than one school! Just make sure you know which hat you're wearing!

G is for Governance Professional

If governance were a stage production, the Governance Professional would be the person who makes sure the curtain goes up on time, the actors know their lines, the props are in the right place, and the audience gets home safely – all while staying firmly behind the scenes. They are the invisible glue that holds effective governance together.

The Governance Professional (often still called the clerk, though the role has evolved far beyond minute-taking) is the constitutional and legal conscience of the board. They are the keeper of compliance, the guardian of good process, and the quiet voice that says, "Actually, we can't do that because..." when the board is about to make a decision that would land everyone in hot water.

Important: Not all clerks are Governance Professionals, and not all Governance Professionals are clerks. The title 'Governance Professional' typically indicates someone who has undertaken professional qualifications, has wider governance experience, and may have broader responsibilities beyond clerking meetings – such as strategic governance support, board development, or leading a governance team across a trust.

What does a Governance Professional do?

Before the meeting

- Works with the chair to set the agenda (making sure it's strategic, not a shopping list)
- Sends out papers on time (and chases those who haven't submitted theirs)
- Makes sure the meeting is quorate (and panics quietly if it's not)
- Checks that statutory policies are up for review and reminds the board about deadlines

During the meeting

- Takes accurate minutes that capture decisions, not just discussions
- Advises on process, procedure, and legality (the "constitutional conscience" bit)
- Keeps an eye on the time and gently nudges the chair when the discussion has gone down a rabbit hole
- Records actions and makes sure everyone knows what they're supposed to do next

After the meeting:

- Writes up the minutes (which is harder than it looks – try summarising a two-hour debate about the school vision in three sentences)
- Chases actions and makes sure things actually happen
- Updates records, databases, and websites
- Provides advice and support to governors between meetings

All year round:

- Manages governor appointments, resignations, and elections
- Organises training and induction for new governors
- Keeps track of DBS checks, declarations of interest, and terms of office
- Provides advice on governance structures, Schemes of Delegation, and constitutional matters
- Acts as the link between the board, the headteacher, and (in trusts) the central team

The Governance Professional is not:

- The chair's PA (they work for the whole board)
- A governor (they advise, but don't vote)
- Responsible for writing policies (that's the headteacher's job)
- A dogsbody who does whatever no one else wants to do

Why the Governance Professional matters

Good governance doesn't happen by accident. It happens because someone is making sure the board is doing the right things, in the right way, at the right time. That someone is the Governance Professional.

They are the person who:

- Remembers that the safeguarding policy is due for review
- Knows that you can't co-opt a new governor without checking they're not disqualified
- Spots that the finance committee isn't quorate and quietly rearranges the meeting
- Makes sure the minutes of the exclusion panel are stored securely and confidentially
- Ensures that the board's decisions are lawful, reasonable, and properly recorded

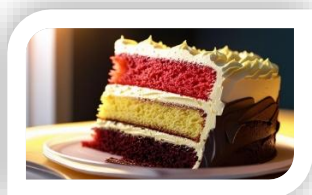
Without a good Governance Professional, boards can drift into poor practice, miss statutory deadlines, make unlawful decisions, and generally tie themselves in knots. With a good Governance Professional, boards can focus on being strategic, asking the right questions, and making a real difference to the school.

The professionalisation of the role

The role of Governance Professional has become increasingly professionalised in recent years. Many Governance Professionals now hold qualifications from organisations like the Chartered Governance Institute (CGI) or the National Governance Association (NGA). They bring expertise in governance, compliance, and strategic support – and they deserve to be recognised and valued for it.

If your Governance Professional is doing their job well, you might not even notice how much they're doing. But trust us – they're doing a lot. So next time you see them, say thank you. And maybe buy them a coffee. Or a large gin.

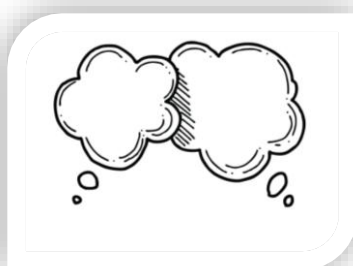
See also: C is for Clerk, F is for Fluency, M is for Minutes (if you have it)



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

G is for Groupthink

Groupthink is the practice of thinking or making decisions as a group without individuals challenging the consensus and this can result in poor-quality decision-making.



One of the signs of groupthink is a *deficit of challenge*, where no one asks questions or queries the status quo. You can read a little about group think [here](#). The article suggests that in order to minimise the effects or impact of a groupthink that *it is critical to allow enough time for issues to be fully discussed, and for as many group members as possible to share their thoughts*.

Have you ever witnessed groupthink on your board?

It is important that, if possible:

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

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

	Deficit of Challenge	Healthy Challenge
Questioning	Few or superficial questions; mostly operational or seeking clarification of meaning; accepts reports at face value;	Probing, strategic questions; evidence-based; asks “why” “so what?” and “what’s the impact?”
Evidence Use	Relies solely on leadership reports; little triangulation and no independent governance visits	Uses multiple data sources (staff, pupils, benchmarking, governance visits) to form ‘independent’ view
Decision-Making	Approves proposals without scrutiny; lacks rationale – <i>not wanting to rock the boat</i>	Decisions are tested against data, strategy, values, and risk – there is a clear decision pathway

Discussion of Risks	Avoids sensitive or difficult topics; discomfort prevents debate; delays decisions; accepts what is presented without challenge	Openly explores risks, challenges assumptions, and considers worst-case scenarios
Board Culture	Homogeneous thinking; rubber-stamping; low accountability; low attendance at meetings	Diverse perspectives; constructive debate; culture of accountability and curiosity
Outcome Focus	Focus on activities, processes, or compliance; little or no attention to impact	Focus on outcomes, pupil progress, and long-term sustainability; strategy at the heart of decision making
Documentation	Minutes show agreement without evidence of questioning	Minutes reflect clear debate, questions asked, evidence considered, and rationale for decisions articulated.

Table 4

See also: C is for Challenge, C is for Candour

G is not for Guess

Good governance is based on evidence, not guesswork. While intuition has its place, decisions should be informed by data, professional advice, and thorough discussion. In the shifting sands of school funding and policy changes, guessing is risky – good preparation and robust evidence are your best defence.

H is for Headteacher's Report (and CEO Report)

A Headteacher's report is one of the most important documents governors receive. It should give the board a clear, concise picture of what is happening in the school and, crucially, what governors need to know in order to provide effective oversight, challenge, and support.

In a trust or other education organisation, the equivalent may be a CEO Report. Although the context and level of detail may be different, the underlying principle is the same: the report should give those responsible for governance the information they need to understand performance, identify risks, provide challenge, and support, and hold leaders to account.

Most Headteachers prepare a regular report for governors, although the format and content can vary considerably. Some boards receive a Headteacher's Report; others have a Senior Leaders' Report, prepared jointly by members of the senior leadership team and potentially including contributions from colleagues such as the School Business Manager.

Whatever the format, the principle is the same: the report should contain the information governors need and want to know — not simply everything the leader wants to report.

So, what should governors and trustees expect?

A good leadership report should help governors understand:

- What is happening?
- What has changed since the last report?
- What is going well?
- What is not going as well as expected?
- What are the key risks or areas of concern?
- What is being done about them?
- What does the governing board need to know, challenge, support or decide?

For a CEO Report, this may also include information that enables trustees or other governance bodies (such as the Members) to understand performance across the trust, identify variation between schools, consider strategic risks, and assess progress against the organisation's priorities.

- This does not mean governors or trustees need every piece of data, every operational detail, or a narrative account of everything that has happened since the last meeting.
- Governance is not about collecting information for the sake of it. It is about having the right information at the right level to enable governors and trustees to ask informed questions and make sound decisions.

When it comes to Headteacher's Reports — and CEO Reports — try to think less is more.

- An 80-page report containing pages of tables, graphs and statistics may look impressive, but it does not necessarily provide better assurance. In fact, it can make it harder for governors or trustees to identify what really matters.
- If the Headteacher's or CEO's report is 80+ pages, in full colour, packed with data and printed in 10-point font, it may be worth asking about their wellbeing. Actually, no. It is essential that you ask.
- A shorter report that clearly identifies the important issues, explains the context and highlights where governors or trustees need to focus is likely to be much more useful than a lengthy data dump. This is not about reducing accountability. Quite the opposite in fact. Good reporting makes accountability stronger because it focuses attention on the things that matter.

The level of reporting matters

There is an important difference between a report to a local governing body and a report to a trust board.

A Headteacher's Report to a local governing body should provide sufficient information for governors to understand the school's performance, context, priorities, and key risks, while remaining focused on matters that fall within the governing body's remit.

A CEO Report to a trust board needs to operate at a more strategic level. Trustees may need to understand:

- Performance across the trust and significant variation between schools
- Progress against strategic priorities
- Key educational, financial, safeguarding, and operational risks
- Organisational capacity and leadership
- Significant changes or emerging issues
- The effectiveness of actions being taken; and
- Matters requiring trustee oversight, challenge, or decision

The CEO should not simply reproduce the information already available to individual governing bodies. The report should add strategic context and insight.

Equally, the Headteacher should not be expected to produce a mini-CEO report. The level of reporting should reflect the role, responsibilities, and information needs of the particular governance body.

The Headteacher or CEO should not be expected to spoon-feed governors or trustees either the questions or the answers. Governors and trustees should read the report before the meeting, consider what it tells them, identify what they do not understand and think about where further questioning may be appropriate. If there is a significant change, an emerging risk, an area of underperformance or a matter where governors or trustees need to provide support or make a decision, the report should make this clear.

Governors and trustees should also be reasonable when requesting additional information. It is perfectly legitimate to ask for information that enables effective challenge and oversight. It is less helpful to request information simply because it is interesting, because it has always been provided, or because a governor or trustee happens to have a particular interest.

Remember curiosity is good but purposeful curiosity is better.

Before the meeting

Always try to read the leadership report before you attend the meeting.

Reading it in advance means governors and trustees can:

- Identify the issues they want to explore
- Distinguish between information and issues requiring discussion
- Avoid asking questions that are already answered in the report
- Consider whether the leader's response to a challenge is sufficient
- Identify where further evidence or assurance may be needed; and
- Make better use of the governing board or trust board's limited meeting time

The report should be a starting point for discussion, not the discussion itself.

5 Key Questions

1. Is the report clear? Can you quickly understand what is happening, without jargon or excessive detail?
2. Is it evidence-based? Are key claims supported by data, examples, pupil outcomes, attendance, behaviour, safeguarding information, staff evidence, etc.?
3. Is it evaluative, not just descriptive? Does it explain what has improved, what hasn't, why, and how confident we are—rather than simply listing activities?
4. Does it identify priorities and risks? Does the report make clear what needs attention, what could go wrong, and where governors should be asking challenging questions?
5. Does it lead to action and accountability? Is it clear what will happen next, who is responsible, by when, and how governors will know whether it has worked?

The next 2 H's are new to the 2026 Glossary and are intentionally more lengthy than some of the other definitions. This is because these two H's are often overlooked in terms of their wider importance to good governance.

H is for Headteacher (or CEO) Performance Appraisal/Management

The performance appraisal of the headteacher (or CEO in a trust) is one of the most important responsibilities of the governing board. It's not just about accountability – it's about supporting your headteacher to be the best they can be, which in turn benefits the whole school community.

The headteacher's performance has a direct impact on the quality of education, staff morale, pupil outcomes, and the overall effectiveness of the school. Getting their appraisal right means:

- Clear expectations and objectives are set
- The headteacher receives constructive feedback and support
- Performance is linked to pay progression (where applicable)
- Any concerns are identified and addressed early
- The headteacher feels valued and supported

Who does it?

In maintained schools:

- A panel of 2-3 governors (usually including the chair) carries out the appraisal
- The panel must include at least one governor who has completed safer recruitment training
- An external advisor must be appointed to provide advice and support to the panel
- The external advisor should have experience and expertise in school leadership and performance management

In academy trusts:

- The trust board is responsible for the CEO's appraisal
- For headteachers in individual academies, the trust board may delegate this to a local governing body or retain it centrally – check your Scheme of Delegation
- An external advisor should be used, as in maintained schools

Important: Parent and staff governors can sit on the appraisal panel. There is no legal reason to exclude them, and their perspective can be valuable. However, they must be able to maintain confidentiality and act in the best interests of the school.

The process

The appraisal process typically follows this cycle:

1. Set objectives (usually in the autumn term)

- Objectives should be SMART (Specific, Measurable, Achievable, Relevant, Time-bound)
- There are usually 3-5 objectives covering areas such as:
 - Pupil outcomes and progress
 - Leadership and management
 - Personal professional development
- Objectives should be challenging but achievable, and should link to the school's strategic priorities
- The external advisor helps the panel to set appropriate objectives

2. Mid-year review (usually in the spring term)

- The panel meets with the headteacher to review progress against objectives
- This is an opportunity to provide feedback, offer support, and adjust objectives if circumstances have changed
- It's not a formal assessment – it's a supportive check-in

3. End-of-year appraisal (usually in the summer term)

- The panel assesses whether the headteacher has met their objectives
- The external advisor provides an independent view
- The panel writes an appraisal statement summarising performance and setting out any recommendations (including pay progression)
- The headteacher has the right to add written comments to the appraisal statement

Pay progression

In maintained schools, headteacher pay is governed by the School Teachers' Pay and Conditions Document (STPCD). Pay progression is linked to performance, and the appraisal panel makes recommendations to the full governing board (or the pay committee) about whether the headteacher should move up the pay range.

In academies, the trust board sets its own pay policy and may or may not follow the STPCD. Check your trust's pay policy to understand how headteacher pay progression works.

Important: Pay decisions must be fair, transparent, and based on evidence of performance. The headteacher should understand how their pay is determined and what they need to do to progress.

The role of the external advisor

The external advisor is there to:

- Provide objective, professional advice to the appraisal panel
- Help set appropriate objectives

- Observe the headteacher's work (e.g., attending a staff meeting, reviewing school data)
- Provide an independent assessment of performance
- Ensure the process is fair and robust

The external advisor does not make decisions – that's the panel's job. But their advice should be taken seriously.

Common pitfalls

- Setting vague or unmeasurable objectives – *"Improve pupil outcomes"* is not specific enough. *"Increase the percentage of pupils achieving the expected standard in reading from 65% to 72%"* is better. However, careful thought should always be given to setting quantitative objectives because Quantitative objectives should be carefully chosen because poorly designed targets can create unrealistic expectations, encourage unintended behaviours, or measure the wrong outcomes
- Not using the external advisor properly. The external advisor should be involved throughout the process, not just brought in at the end.
- Avoiding difficult conversations. If there are concerns about the headteacher's performance, they need to be raised early and supportively, not left until the end-of-year appraisal.
- Confusing appraisal with capability. Appraisal is about supporting performance and development. If there are serious concerns about a headteacher's capability, that's a separate process and requires HR and legal advice.
- Not linking objectives to the school's strategic priorities. The headteacher's objectives should drive the school forward, not just tick boxes.

Questions governors and trustees should ask

1. Have we set clear, measurable objectives that link to our school improvement plan?
2. Is the headteacher clear about what they need to achieve and how their performance will be assessed?
3. Have we appointed a suitably qualified and experienced external advisor?
4. Are we providing the headteacher with the support and resources they need to meet their objectives?
5. Have we scheduled mid-year and end-of-year reviews in advance?
6. Is the process fair, transparent, and well-documented?

Top Tips

- Be supportive, not just evaluative. The appraisal process should help the headteacher or CEO to develop and succeed, not just judge their performance.
- Keep good records. Document meetings, decisions, and evidence of performance. This protects both the headteacher and the board. This is really important and will be picked by external audit. Remember the pay of the trust and schools leaders over £100,000 pa needs to be published on the website. The ATH 2026 now requires additional evidence for pay over £174,000.
- Communicate clearly. Make sure the headteacher or CEO knows what's expected of them and how they're doing throughout the year.
- Use your external advisor. They're there to help – make the most of their expertise.
- Link appraisal to wellbeing. Leaders who are overwhelmed or unsupported will struggle to perform. Check in on their wellbeing as well as their objectives. This is really important and perhaps one of the most important behind the scenes role of the chair.

H is for Health and Safety

Health and safety is both a **legal requirement and a moral responsibility**. As a governor or trustee, your role is to provide **strategic oversight and assurance**, not to manage health and safety day to day.

The board should ensure there are:

- Appropriate health and safety policies and procedures;
- Effective risk management and risk assessments;
- Competent people responsible for health and safety;
- Regular audits and monitoring; and
- A culture where health and safety is taken seriously.

The exact responsibilities differ between maintained schools and academy trusts, so make sure you understand **who is responsible for what** in your school or trust.

Questions to ask

- Is our health and safety policy up to date?
- When was our last health and safety audit and have actions been completed?
- Are there any significant risks or recurring accidents/incidents we need to know about?
- Are staff appropriately trained?
- Are fire safety, asbestos, premises and other significant risks being properly managed?

You don't need to read every risk assessment or inspect every fire extinguisher! Your job is to seek assurance that the right people are doing the right things and that significant risks are being identified and managed.

Consider including health and safety in your annual governance planner and, where appropriate, appointing a link governor/trustee.

In academy trusts:

- The trust board is the employer and has overall responsibility for health and safety across all schools in the trust
- Individual academy headteachers are responsible for implementing health and safety policies and procedures in their schools

The trust may have a central health and safety lead or team to support schools

Key actions

- Appoint a health and safety link governor or trustee. This governor can liaise with the site manager or health and safety lead and report back to the board.
- Include health and safety as a standing item on the agenda. This ensures it's discussed regularly, not just when something goes wrong.
- Visit the site. A governor walk-around can help you understand the physical environment and spot potential hazards (though this is about awareness, not inspection).
- Ask for a summary report. Rather than wading through pages of risk assessments, ask for a summary report highlighting key risks, actions taken, and any areas of concern.
- Don't panic. Health and safety can feel overwhelming, but most schools manage it well. Your job is to provide oversight and assurance, not to become a health and safety expert.
- And don't get too enmeshed in the details...

Top Tip:

Don't confuse **oversight with inspection**. You don't need to become a health and safety expert — you need to be assured that the school or trust is managing its responsibilities effectively.

H is for Happy

Whilst governing is challenging at times it should also be enjoyable. There is no shame in admitting we enjoy the meeting. Cake and biscuits at meetings are always optional obviously but are a small gesture in the

overall scheme of things. Governing in school is an act of service but it should not constitute your whole social life.

If you're dreading every meeting, something is wrong. Talk to the chair or clerk about how to make governance more enjoyable and sustainable.

Remember: effective governance happens when people feel valued, supported, and part of a team. A bit of cake helps too!

Some trusts use happiness as a key metric. What do you think?

H is for HR (Human Resources)

Human resources matters are some of the most complex and sensitive issues that governing boards deal with. Getting HR decisions right is essential – not just for legal compliance, but for staff morale, wellbeing, and the overall effectiveness of the school.

Who employs staff?

- **In academies:** Staff are employed by the trust, not by the local authority. The trust board is the employer and has ultimate responsibility for all employment matters, although day-to-day HR management is delegated to headteachers and senior leaders.
- **In maintained schools:** The local authority is usually the employer for most staff, although the governing board has significant responsibilities for managing staff on behalf of the LA. Check your local authority's scheme for financing schools to understand exactly where responsibilities lie.
- **In Voluntary Aided (VA) schools:** The governing body is the employer of all staff (teachers and support staff). This includes full responsibility for contracts, pay, discipline, appraisal, and recruitment. The governing body works in partnership with the local authority for funding allocations and may choose to follow LA policies for pay and conditions, but the legal employer is the governing body.

The board's role in HR

The governing board's role is strategic oversight, not operational management. You are responsible for:

- Approving HR policies – including recruitment, capability, disciplinary, grievance, pay, absence management, and whistleblowing policies
- Monitoring the implementation of HR policies – making sure they are being followed fairly and consistently
- Ensuring compliance with employment law – including the Equality Act 2010, safeguarding requirements, and health and safety legislation
- Overseeing workforce planning – making sure the school has the right staff, in the right roles, with the right skills
- Monitoring staff wellbeing – including workload, absence rates, and staff survey results
- Making key decisions – such as headteacher appointments, senior leadership pay, and (in some cases) staff dismissals

Remember: you are not responsible for

- Day-to-day line management
- Conducting disciplinary or grievance hearings (unless you're on a panel)
- Recruitment interviews (unless you're on a panel)
- Setting individual staff objectives or conducting appraisals (unless it's the headteacher's appraisal)

HR committees and panels

Some boards have a staffing or personnel committee that oversees HR matters and makes recommendations to the full board. The committee's terms of reference should be clear about what it can decide and what must go to the full board.

Governors may also be asked to sit on HR panels, such as:

- Recruitment panels – for senior leadership appointments
- Disciplinary panels – to hear disciplinary cases (usually for senior staff)
- Grievance panels – to hear staff grievances
- Capability panels – to manage capability concerns
- Dismissal appeal panels – to hear appeals against dismissal

Important: Personnel meetings and panels should be clerked by someone who is not an employee of the school. This avoids conflicts of interest and ensures impartiality. If this is not feasible, consider using an external HR advisor or clerk.

When things get difficult

HR matters can be legally complex and carry significant risk. You Always seek appropriate HR advice early when dealing with:

- disciplinary, capability or grievance matters;
- dismissal, redundancy or restructuring;
- discrimination or harassment allegations;
- whistleblowing; or
- potential employment tribunal claims.

Use your LA, trust central team, HR or legal provider or specialist legal advice as appropriate.

If you have HR expertise...

Your professional experience can be extremely valuable, but remember you are a governor/trustee first. Don't become the school's unofficial HR adviser or get drawn into operational matters. Offer strategic insight to the board and, where appropriate, use your expertise as part of a properly constituted panel.

If in doubt, speak to the chair or clerk about how best to use your expertise without crossing boundaries.

Key HR policies the board should have

At a minimum, your school or trust should have policies covering:

- Recruitment and selection (including safer recruitment)
- Pay and performance management
- Capability
- Disciplinary
- Grievance
- Absence management
- Whistleblowing
- Equality and diversity
- Staff wellbeing and workload

These policies should be reviewed regularly, approved by the board, and made available to all staff.

Questions to ask about HR

1. Do we have all the HR policies we need, and are they up to date?

2. Are our HR policies being followed consistently and fairly?
3. What is our staff turnover rate, and are there any patterns or concerns?
4. What is our staff absence rate, and how does it compare to similar schools?
5. Are there any ongoing HR cases (disciplinary, grievances, capability) that the board should be aware of?
6. What are we doing to support staff wellbeing and manage workload?
7. Are we compliant with safer recruitment requirements?
8. Do we have access to good-quality HR advice and support?

Top Tips

- Get training. If you're going to sit on HR panels, make sure you've had proper training in the relevant procedures. This is really important.
- Stay strategic. Don't get drawn into operational HR matters – that's the headteacher's job.
- Seek advice early. HR problems rarely get better if you ignore them. Get expert advice as soon as concerns arise.
- Be fair and consistent. Make sure HR policies are applied fairly to all staff, regardless of their role or relationship with the school.
- Think about wellbeing. HR is not just about managing problems – it's about creating a workplace where staff feel valued, supported, and able to do their best work.
- Never agree to meet a member of staff on your own if you think that it is an HR matter.

I is for ICFP

Integrated Curriculum and Financial Planning (ICFP) is a strategic approach that brings curriculum planning, staffing, and financial planning together, helping schools and trusts understand the financial impact of the curriculum they provide.

Rather than preparing the budget separately from curriculum and staffing decisions, ICFP helps leaders and boards consider pupil numbers, class sizes, staffing structures, curriculum requirements, and affordability as one picture.

For governors and trustees, it provides a useful framework for challenging whether:

- Resources are being used effectively
- The staffing structure supports the curriculum
- The school's or trust's plans are financially sustainable

The DfE's *Integrated Curriculum and Financial Planning* guidance provides tools and resources to support this approach.

Why ICFP matters

ICFP helps boards ask the right questions about how money, people, and curriculum fit together. It's particularly useful when:

- Planning for changes in pupil numbers (growth or decline)
- Reviewing staffing structures or making redundancies
- Considering curriculum changes (e.g., adding new subjects, changing class sizes)
- Setting the budget for the year ahead
- Responding to financial pressures or deficits

Without ICFP, schools risk making decisions in silos – for example, cutting teaching posts to balance the budget without considering the impact on curriculum breadth or class sizes.

Top Tips

- Look at curriculum and finance together – ask how staffing decisions affect both the curriculum and the budget
- Understand the numbers – pupil numbers, class sizes, teacher deployment, and staffing costs are key ICFP drivers
- Use the DfE tools – the DfE's ICFP guidance includes templates and scenario-planning tools that can help you model different options
- Challenge assumptions – ask: "What would happen if pupil numbers drop by 10%? What if we increased class sizes by 2 pupils? What if we restructured the leadership team?"
- Link ICFP to your School Development Plan – curriculum and staffing decisions should flow from your strategic priorities, not just from budget constraints

Questions to ask

1. How do our pupil numbers and class sizes compare to similar schools?
2. Is our staffing structure aligned with our curriculum offer and our strategic priorities?
3. What are the financial implications of our curriculum decisions (e.g., small class sizes, specialist teaching, enrichment)?
4. Have we modelled different scenarios (e.g., falling rolls, increased costs, changes to funding)?
5. Are we using the DfE's ICFP tools, and if not, why not?
6. How does our curriculum spending compare to benchmarking data?

Where to find the guidance

The DfE's *Integrated Curriculum and Financial Planning* guidance is available on GOV.UK. It includes:

- An overview of the ICFP approach
- Templates for scenario planning
- Case studies from schools and trusts
- Links to benchmarking tools

See also: F is for Finance, B is for Budget, B is for Benchmarking, S is for Staffing, C is for Curriculum

I is for IEB

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

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

I is for Inclusion

This is perhaps the longest of the new sections added to the Glossary this year. The Schools White Paper will come into force over the coming months and if inclusion is a term new to you please do ask for training and additional support. It is important that we remember that every child matters and we have a duty as governors and trustees to keep them all at the centre of everything we do.

Inclusion means ensuring that **every child**, regardless of their background, needs, or circumstances, has full access to high-quality education, feels valued and respected, and is supported to reach their full potential. It's not just about being *in* school — it's about being fully *included* in the life and learning of the school.

Inclusion is a legal duty and a core principle of effective education. It applies to all pupils, but particularly those with **SEND** (Special Educational Needs and Disabilities), disadvantaged pupils, pupils with English as an additional language (EAL), looked-after children, and any other pupils who may face barriers to learning or participation.

The Schools White Paper 2026: A New Era for Inclusion

The government's **Schools White Paper (February 2026)** sets out a fundamental reform of the SEND system, with inclusion at its heart. The reforms aim to move away from a reliance on statutory **EHCPs** (Education, Health, and Care Plans) and towards a system where **mainstream schools are truly inclusive** through high-quality adaptive teaching and early intervention.

Key changes include:

- A four-tiered model of support:
 - Universal — High-quality, inclusive teaching for all
 - Targeted — School-led interventions for pupils who need additional support
 - Targeted Plus — Access to specialist advice (e.g., educational psychologists, speech and language therapists) without needing an EHCP
 - Specialist — For pupils with the most complex needs, via a reformed "Specialist Provision Package" (replacing/reforming EHCPs)
- Individual Support Plans (ISPs) — A new statutory requirement for schools to create digital, portable plans for any child receiving Targeted support. These do not require a formal diagnosis and are co-developed with parents.
- Inclusion Bases — Every secondary school (and eventually primary schools) is expected to establish an Inclusion Base — a dedicated safe space for targeted interventions and support.
- Experts at Hand — A £1.8 billion investment to provide direct access to specialists (educational psychologists, speech and language therapists) in schools, bypassing the need for an EHCP to access advice.
- Inclusive Mainstream Fund — Schools will receive direct funding (£1.6 billion) to deliver ISPs and embed inclusive practices.
- New Inclusion Strategy — Schools must publish an annual Inclusion Strategy (replacing the SEN Information Report), setting out how they use funding and embed inclusive practices.
- Ofsted Inclusion Grade — From September 2029, Ofsted will provide a specific grade for "Inclusion", holding schools to account for how well they support all pupils, including the most vulnerable.

Timeline:

- Consultation: February 2026 – May 2026 (12 weeks)
- Legislation: Expected in the parliamentary session starting May 2026
- Implementation: First new assessments begin September 2029. No changes to existing EHCP support until at least September 2030.

What this means for governors and trustees:

- Inclusion is now a strategic priority. Boards must ensure their schools are ready for the reforms and are embedding inclusive practices now.
- New statutory duties. Schools will be required to publish an Inclusion Strategy, create ISPs for pupils receiving Targeted support, and establish Inclusion Bases (secondary schools first).

- Funding and accountability. Schools will receive funding from the Inclusive Mainstream Fund to deliver ISPs and support. Governors must ensure this funding is used effectively and that impact is monitored.
- Ofsted accountability. From September 2029, Ofsted will grade schools on Inclusion. Governors need to understand what "good" inclusion looks like and how it will be assessed.
- Cultural shift. The reforms are designed to make mainstream schools truly inclusive. This requires a shift in mindset, culture, and practice — not just policies and processes.

Why inclusion matters:

- It's the law. Schools have duties under the Equality Act 2010, the Children and Families Act 2014, and the SEND Code of Practice to ensure all pupils are included and supported. The White Paper reinforces and extends these duties.
- It's about equity, not just equality. Inclusion means recognising that not all pupils start from the same place, and some need additional or different support to thrive. It's about removing barriers, not treating everyone the same.
- It drives outcomes. When pupils feel included, valued, and supported, they do better — academically, socially, and emotionally.
- It reflects values. An inclusive school is one that lives its values of respect, fairness, and ambition for all.
- It's a whole-school responsibility. Inclusion is not just the SENCO's job. It's embedded in teaching, leadership, culture, and governance.

What inclusion looks like in practice:

- High-quality adaptive teaching — All pupils, including those with SEND, have access to a broad, balanced, and ambitious curriculum. Teachers adapt their teaching to meet the needs of all learners, with high expectations for all.
- Early identification and support — Needs are identified early, and support is put in place quickly and effectively through the Targeted and Targeted Plus tiers.
- Individual Support Plans (ISPs) — Digital, portable plans co-developed with parents that set out the support a child needs and the outcomes they are working towards.
- Inclusion Bases — Dedicated spaces where pupils can access targeted interventions, support, and a safe space when needed.
- Access to specialists — Schools can access educational psychologists, speech and language therapists, and other specialists through Experts at Hand, without needing an EHCP.
- Belonging and culture — All pupils feel safe, valued, and that they belong. The school actively challenges discrimination, bullying, and exclusion.
- Participation — All pupils can participate fully in school life — lessons, trips, clubs, assemblies, and leadership opportunities.

Inclusion is not

- Just about SEND (though SEND is a key part of it)
- Lowering expectations or "dumbing down" the curriculum
- Putting pupils in separate groups or settings unless absolutely necessary
- A "nice to have" — it's a legal and moral duty
- Just about compliance — it's about culture, values, and outcomes

What governors need to know:

- Understand the reforms. Familiarise yourself with the Schools White Paper 2026 and the new tiered model of support. Ask your SENCO or headteacher to brief the board.

- Prepare for the Inclusion Strategy. From September 2029, schools must publish an annual Inclusion Strategy. Start thinking about this now — what does inclusion look like in your school? How will you evidence it?
- Monitor funding and impact. Schools will receive funding from the Inclusive Mainstream Fund. Governors must ensure this is used effectively and that impact is monitored. Ask: What difference is this funding making to outcomes for pupils with SEND and other vulnerable groups?
- Understand ISPs. Ask how ISPs are being developed, who is involved, and how impact is being measured. Are parents genuinely co-producing these plans?
- Check the culture. Do all pupils feel included, safe, and valued? What does pupil voice tell you? Are there any pupils on reduced timetables or at risk of exclusion?
- Prepare for Ofsted. From September 2029, Ofsted will grade schools on Inclusion. Make sure you understand what "good" inclusion looks like and how your school is preparing.
- Ask about Inclusion Bases. What are your plans for establishing an Inclusion Base? How will it be staffed, funded, and used?

Questions governors could ask:

1. How are we preparing for the SEND and inclusion reforms set out in the Schools White Paper?
2. What is our plan for developing and implementing Individual Support Plans (ISPs)? How are parents involved?
3. How will we use the Inclusive Mainstream Fund, and how will we monitor its impact?
4. What does our Inclusion Strategy look like, and how does it reflect our school values and context?
5. How do we ensure all pupils, including those with SEND, have access to a broad and ambitious curriculum with high expectations?
6. What barriers to learning and participation exist in our school, and how are we removing them?
7. How do we know that all pupils feel included, safe, and valued? What does pupil voice tell us?
8. What is the progress and attendance data for our most vulnerable groups (SEND, disadvantaged, EAL, looked-after children)?
9. If we're a secondary school, what are our plans for establishing an Inclusion Base?
10. How are we preparing for the new Ofsted Inclusion grade?

Top Tip

Inclusion isn't just about policies and data. Visit the school. Talk to pupils. Ask them if they feel included, safe, and supported. Their voices will tell you more than any report. And remember: the reforms are coming, but inclusion starts now. Don't wait for September 2029 start to ask about how inclusivity is being embedded, celebrated and monitored as soon as possible.

Remember: Mainstream schools are required to develop an inclusion strategy by December 31.2026; if you are interested the DfE have produced guidance for school leaders [Inclusive mainstream fund: support for school leaders - GOV.UK](#)

See also: S is for SEND / Special Schools, E is for Equality, E is for Exclusion, C is for Culture, C is for Curriculum, A is for Attendance, B is for Belonging, P is for Pupil Voice.

Actions for Trustees (Trust Board in a MAT):

If you're a trustee in a multi-academy trust, your role is to ensure **trust-wide** oversight, consistency, and strategic leadership on inclusion. Here are three key actions:

1. Ensure a trust-wide Inclusion Strategy and consistent approach

Action: Commission and approve a trust-wide Inclusion Strategy that sets out the trust's vision, values, and approach to inclusion across all schools. This should align with the Schools White Paper reforms and ensure consistency in how schools identify needs, deliver support, and monitor impact.

Questions to ask:

1. Do we have a clear, trust-wide vision for inclusion that reflects our values?
2. How do we ensure consistency in the quality of inclusive practice across all our schools?
3. What support and training are we providing to school leaders and SENCOs to embed inclusive practices?
4. How are we sharing best practice across the trust?

2. Monitor trust-wide data and outcomes for vulnerable groups

Action: Require regular trust-wide reporting on outcomes, attendance, exclusions, and progress for pupils with SEND, disadvantaged pupils, and other vulnerable groups. Use this data to identify trends, gaps, and schools that may need additional support.

Questions to ask:

1. What does the trust-wide data tell us about outcomes for pupils with SEND and other vulnerable groups?
2. Are there any schools where outcomes, attendance, or exclusions for vulnerable groups are a concern?
3. How are we supporting schools to close gaps and improve outcomes for these pupils?
4. What is our trust-wide exclusion rate for SEND pupils, and how does this compare to national averages?

3. Prepare the trust for the SEND reforms and Ofsted Inclusion grade

Action: Establish a trust-wide action plan to prepare all schools for the SEND reforms (ISPs, Inclusion Bases, Inclusion Strategies) and the new Ofsted Inclusion grade (from September 2029). Ensure adequate funding, capacity, and support are in place.

Questions to ask:

1. What is our trust-wide plan for implementing the SEND reforms (ISPs, Inclusion Bases, Experts at Hand)?
2. How are we ensuring all schools have the capacity, funding, and expertise to deliver high-quality inclusive practice?
3. How are we preparing for the Ofsted Inclusion grade, and what does "good" inclusion look like across our trust?
4. Are there any schools that need additional support or intervention to improve inclusion?

If you're a trustee in a multi-academy trust, your role is to ensure **trust-wide** oversight, consistency, and strategic leadership on inclusion.

Here are three key actions:

Ensure a trust-wide Inclusion Strategy and consistent approach

Commission and approve a **trust-wide Inclusion Strategy** that sets out the trust's vision, values, and approach to inclusion across all schools. Ensure consistency in how schools identify needs, deliver support, and monitor impact. Ask: *Do we have a clear, trust-wide vision for inclusion? How do we ensure consistency in quality across all our schools?*

Monitor trust-wide data and outcomes for vulnerable groups

Require regular trust-wide reporting on **outcomes, attendance, exclusions, and progress** for pupils with SEND, disadvantaged pupils, and other vulnerable groups. Use this data to identify trends, gaps, and schools that may need additional support. Ask: *What does the trust-wide data tell us? Are there any schools where outcomes for vulnerable groups are a concern?*

Prepare the trust for the SEND reforms and Ofsted Inclusion grade

Establish a **trust-wide action plan** to prepare all schools for the SEND reforms (ISPs, Inclusion Bases, Inclusion Strategies) and the new Ofsted **Inclusion** grade (from September 2029). Ensure adequate funding, capacity, and support are in place. Ask: *What is our trust-wide plan for implementing the reforms? How are we preparing for the Ofsted Inclusion grade?*

I is for Influence

Influence is the ability to affect what people think, how they see an issue, what they decide and ultimately what they do.

In governance, influence is everywhere. It comes from formal authority, but also from experience, expertise, confidence, relationships, reputation, personality, information and simply being the person who speaks first — or speaks most often.

Influence is not the same as bias. Bias is about the way our own perspectives and assumptions can shape our judgement. Nor is it the same as groupthink, where the desire for consensus can suppress challenge. Influence is broader: it is about the effect one person, group or idea has on another.

That makes influence neither good nor bad. A skilled governor may influence a discussion by asking the question that everyone else had missed. An experienced leader may influence a board because they understand the detail. A chair may influence the tone of a meeting simply through the way they respond to challenge.

But influence can also become problematic when it is invisible, disproportionate or goes unexamined. A confident voice can carry more weight than a quiet one. A long-serving governor can unintentionally make a new governor reluctant to challenge. An individual with particular expertise can become the person whose view is rarely questioned.

Good governance does not try to eliminate influence. It makes influence visible and creates enough space for it to be tested.

Sometimes the most important question is not “*Who has the authority to make this decision?*” but: “*Who is influencing the decision — and how?*”

At your next meeting, don't just listen to what is being said — notice whose voice changes the conversation.

Afterwards, ask yourself:

- Who spoke first?
- Whose view did people seem to follow?
- Who was interrupted or not heard?
- Did anyone change their position?
- Did expertise, confidence, status or length of service seem to carry particular weight?
- What influence did I have — even if I barely spoke?

You don't need to challenge anything immediately. Just notice the pattern.

As a new governor or trustee you have an advantage: you haven't yet learned which voices are supposed to carry the most weight. Use that fresh perspective to notice what others may have stopped noticing.

Top Tip: think about who is shaping the discussion and therefore the decisions

See also: B is for Bias, D is for De Facto Trustee, G is for Group Think

I is for Impact and Implementation

Impact can be both positive and negative and is worth double checking you are having an impact on a regular basis. Do not worry too much at first as new governor if you are not seeing much impact – this will become more evident to you over time. If, however, governors and trustees cannot articulate impact in any way – i.e. the positive difference they are making then it may be advisable to seek some external support.

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

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

Top Tips

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

I is for Information Governance

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

I is for Induction

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

You should also be offered a tour of the school(s) – this is useful as it helps you to picture the school in your mind when you are discussing Year 4 or the geography department.

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

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

I is for Innovate

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

Think about what is working well and do more of it.

I is for Instrument of Government

In a maintained school¹⁵ the structure of the board is set out in a legal document called the Instrument of Government. The IoG states the name of the school, any religious designation, the number and type of governors on the board. In a faith school the IoG needs to be approved by the Diocese as well as the Local Authority. In a maintained school the board must consist of as a minimum:

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

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

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

J is for Joy

Governance should bring joy. Not every moment, obviously - budgets, complaints panels, and difficult decisions are rarely joyful. But if you never experience joy in your role as a governor or trustee, something is wrong.

Joy comes from:

- Seeing pupils thrive and achieve
- Knowing you've made a difference
- Working with people who share your values and commitment
- Celebrating successes (big and small)
- Being part of something bigger than yourself
- A cup of tea or coffee!

If governance feels like a burden rather than a privilege, talk to the chair or clerk. Life's too short to do something important without finding any joy in it.

See also: H is for Happy

J is for Just

There is no such thing as *just* a governor or trustee.

Every governor and trustee has equal responsibility and equal accountability. Whether you're the chair or a newly appointed co-opted governor, you all share collective responsibility for the decisions the board makes.

"*I'm just a parent governor*" or "*I'm just here to make up the numbers*" are phrases that should never be heard around a board table. You are a governor or Trustee. You have a voice. You have a vote. You have a responsibility to challenge, support, and hold leaders to account.

If you're only turning up for meetings three times a year and not engaging with the work of the board, you're not fulfilling your role.

¹⁵https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/640562/The_constitution_of_governing_bodies_of_maintained_schools_2017.pdf

Remember: If you're struggling to engage, talk to the chair or clerk – governance should be rewarding, not a chore or leave you feeling out of your depth.

And while we're on the subject of "just"... be wary of the phrase "*can you just...*" Whether it's directed at you as a governor or trustee, at the headteacher, or at the clerk, the word "just" often minimises what is actually being asked. "*Can you just produce a report on...*" or "*Can you just check the data for...*" or "*Can you just update the policy...*" rarely turns out to be quick or simple. What sounds like a small request can add hours to someone's already heavy workload. Be mindful of what you're asking for, and whether it's genuinely necessary or proportionate. Thank you!

J is for Justice

Sitting alongside the Nolan Principles is the Framework for Ethical Leadership in Education, which sets out seven values for educational leaders: trust, wisdom, kindness, justice, service, courage, and optimism.

Justice is defined in the framework as: "*Leaders are fair and work for the good of all children, enabling them to lead useful, happy and fulfilling lives.*"

This means:

- Fairness - treating all pupils, staff, and stakeholders equitably and without bias
- Equity - recognising that fairness doesn't always mean treating everyone the same; sometimes it means giving additional support to those who need it most
- Working for the good of all children - not just the high achievers, not just the well-behaved, not just those who are easy to teach. All children.
- Enabling pupils to lead useful, happy and fulfilling lives - education is not just about exam results; it's about preparing young people for life

If you govern in the Catholic sector, there is a particular focus on social justice - the idea that everyone deserves equal economic, political, and social rights and opportunities. This will be explained to you during induction and should be reflected in the school's ethos and values.

Questions to ask

1. Are we working for the good of all children, or are some groups being left behind?
2. Do our policies and practices promote fairness and equity?
3. Are we preparing pupils not just for exams, but for life?
4. How do our decisions reflect our commitment to justice and social justice?

See also: N is for Nolan Principles, E is for Equality, E is for Equity, I is for Inclusion, Q is for questions

K is for KCSIE (Keeping Children Safe in Education)

KCSIE is the statutory safeguarding guidance that **all** governors and trustees must read and understand. It is updated annually, usually in September. Always follow your school or trust safeguarding policy, check with your safeguarding leads if you are unsure, and do all training required of you. This Glossary entry is a very high level overview and is not a substitute for expert advice.

Which version should you read?

- For the 2025/26 academic year: [KCSIE 2025](#)
- From September 2026: [KCSIE 2026](#) (updated guidance)

What must you read?

As a minimum, all governors must read:

- Part 1: Safeguarding information for all staff
- Annex A: Further information

Many boards require governors to read the full document to properly fulfil their oversight role. Don't take shortcuts - this is too important.

What's in KCSIE?

KCSIE covers:

- The legal duties and statutory responsibilities for safeguarding
- Types of abuse and specific safeguarding issues (including child-on-child abuse, online safety, sexual violence and harassment)
- What to do if you have concerns about a child
- Safer recruitment practices
- The role of the designated safeguarding lead (DSL)
- Requirements for policies, training, and the single central record

Key updates in KCSIE 2026

The 2026 guidance includes important changes around:

- Volunteers and regulated activity - the supervision exemption has been removed; any volunteer frequently teaching, training, instructing or supervising children is now in regulated activity and requires an enhanced DBS check
- Image sharing terminology - now refers to "making or sharing of nudes or semi-nudes" and explicitly includes AI-generated images
- Filtering and monitoring - annual review is now mandatory, conducted by SLT with DSL and IT support
- Facilities and social transition - new mandatory restrictions on facilities usage based on biological sex, and guidance on social transition
- Child-on-child abuse - substantially rewritten to establish a clear continuum from harmful sexual behaviour to sexual violence

Your responsibilities

You must:

- Read and understand KCSIE
- Sign to confirm you have read it
- The board must record in minutes that all governors have confirmed they've read it
- Re-read it annually when the updated version is published
- Apply this knowledge when making decisions and holding leaders to account
- Follow the school/trust safeguarding policy

Related essential reading

- [Working Together to Safeguard Children 2026](#) - complements KCSIE and covers multi-agency safeguarding duties
- [Designated teacher for looked-after and previously looked-after children \(2018\)](#) - still current and relevant for understanding your duties to these vulnerable pupils
- Your school or trust safeguarding briefings

Quick reminder

S is for Safeguarding = The big picture	K is for KCSIE = The statutory detail	V is for Visits = Safeguarding in practice
What safeguarding is Your overall responsibilities The culture and approach Questions to ask	What you must read What's in the guidance Key updates Your legal duties	How safeguarding works day-to-day Your role in modelling good practice Practical procedures

See also: S is for Safeguarding, T is for Training (this is a good place to start [KCSIE 2026 video](#))

K is for Key Stage

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

Child's age	Year	Key stage	Assessment
3 to 4		Early years	
4 to 5	Reception	Early years	Teacher assessments (there's also an optional assessment at the start of the year)
5 to 6	Year 1	KS1	Phonics screening check
6 to 7	Year 2	KS1	National tests and teacher assessments in English, maths and science
7 to 8	Year 3	KS2	
8 to 9	Year 4	KS2	Multiplication Times Tables test
9 to 10	Year 5	KS2	
10 to 11	Year 6	KS2	National tests and teacher assessments in English and maths, and teacher assessments in science
11 to 12	Year 7	KS3	
12 to 13	Year 8	KS3	
13 to 14	Year 9	KS3	
14 to 15	Year 10	KS4	
15 to 16	Year 11	KS4	GCSEs, etc
16-18	Year 12	KS5	A Levels, etc

K is for Key Line of Inquiry

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

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

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

K is for Kindness

Kindness is one of the seven values in the Framework for Ethical Leadership in Education, alongside trust, wisdom, justice, service, courage, and optimism. It's defined as leaders being "generous and considerate, and care for others."

In governance, kindness matters. It means:

- Treating governance colleagues, staff, pupils, and parents with respect and consideration
- Challenging with care, not criticism
- Recognising that people are doing their best in difficult circumstances
- Being thoughtful about the impact of your words and actions
- Supporting leaders and staff when things are tough, not just holding them to account

Kindness is not the same as being soft or avoiding difficult conversations. You can be kind and still challenge robustly. You can be kind and still hold people to account. And you can do both without being unkind.

Governance can be hard work, and schools are under enormous pressure. A little kindness goes a long way – whether it's thanking the clerk for their work, acknowledging the headteacher's efforts, or simply being considerate about people's time and wellbeing.

See also: J is for Justice, C is for Challenge, W is for Wellbeing

K is for Knowing Your School

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

K is for Key Performance Indicator

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

Some questions you could ask;

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

L is for Late Papers (impact of)

Late papers undermine effective governance by denying governors and trustees adequate time to read, digest, and prepare thoughtful questions, turning meetings into reactive rubber-stamping exercises rather than strategic oversight. They also demonstrate a lack of respect for volunteers' time and contribute to unsustainable workload, as governors are forced to rush through complex documents or arrive unprepared, increasing stress and reducing the quality of challenge and decision-making. Most importantly, late papers create governance risk: decisions made without proper scrutiny can be poorly informed, legally questionable, or miss critical issues that would have been spotted with adequate preparation time.

L is for Leadership

Leadership is one of the most important aspects of effective governance. Ofsted considers governance as part of the Leadership and Management judgement, so the quality of the relationship between school leaders and those responsible for governance matters enormously.

Good governance is not about governors running the school or getting involved in day-to-day management. That is the role of the headteacher and senior leadership team. Instead, governors and trustees need to provide strategic leadership, appropriate challenge and effective oversight. They should understand the school's priorities, know what evidence demonstrates progress and be prepared to ask difficult questions when necessary.

The relationship needs to be one of professional trust and constructive challenge. Governors should be able to support leaders while also asking questions such as:

- What are we trying to achieve?
- How do we know whether we are succeeding?
- What does the evidence tell us?
- What is the impact on pupils?
- What are the risks and how are they being managed?
- What needs to improve, and how will we know that it has improved?

When this relationship works well, governance becomes an important source of support and accountability for school leaders. When it breaks down, the consequences can be significant. Ofsted reports have highlighted situations where relationships between leaders and those responsible for governance have completely broken down, resulting in dysfunctional leadership. Other reports have identified governing bodies that lacked the knowledge and skills necessary to hold leaders to account effectively, with the result that improvement was slowed.

These examples are a useful reminder that effective governance requires more than attending meetings and receiving reports. Governors need to develop their own knowledge and skills, understand the context in which their school operates and continually ask whether they have enough information to fulfil their responsibilities.

Leadership also means looking beyond the immediate issues. Governors and trustees should keep the school's vision and strategic priorities in view and consider whether decisions made today will contribute to sustainable improvement in the future. They should be willing to celebrate success, recognise the hard work of staff and leaders, and equally willing to challenge complacency when expectations are not being met.

It is worth remembering that leadership is not simply about the person at the top. Strong leadership is built through relationships, shared purpose, clear expectations and a willingness to learn. Governing boards can demonstrate leadership themselves by being well prepared, asking thoughtful questions, acting collectively and being clear about the difference between governance and management.

The Ofsted inspection framework continues to evolve, so it is sensible to check the current inspection arrangements rather than relying on older guidance or reports. Reading recent inspection reports can nevertheless be a useful way of seeing how weaknesses in leadership and governance can affect a school in practice.

Top Tips

- There are a myriad of books written about leadership – why not pick one at random and use it as a starting point for discussion?
- Alternatively, take a recent school report or governing board agenda and ask: *“What does this tell us about leadership in our school, and are we providing the right level of support and challenge?”*

A good governing board should be able to answer three simple questions:

1. Do we know where the school is going?
2. Do we know how well it is getting there?
3. Are we providing the right support and challenge to help it succeed?

Those questions can provide a surprisingly useful starting point for a conversation about leadership.

L is for Link Governor

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

Having a link governor for safeguarding is essential but unless you have experience of safeguarding or have been a governor for a while, agreeing to be the safeguarding governor at your first meeting is probably not a good idea. It is a very responsible role. You also need a SEND governor. In secondary schools there must be someone linked to careers. The DfE guidance on working together to improve school attendance¹⁶ sets out clearly in Chapter 3 the ‘expectations of academy trust boards and governing bodies of maintained schools.’ The guidance states *strategies for improving school attendance begin at board level, therefore all academy trust boards, and governing bodies of maintained schools should take an active role in attendance improvement, support their school(s) to prioritise attendance, and work together with school leaders to set whole school attendance cultures.* Perhaps you can ask about attendance at every link visit – especially if you are the safeguarding and/or SEND link?

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

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

The benefits of having link roles includes:

- Sharing the workload,
- Increasing understanding,
- Improving the knowledge of the whole board.

It is important that if you do a link visit that you keep a record or write a report (your school should have an agreed template or report form or template which you should use). Unfortunately, these reports need to be a little more in depth than ‘*I had a lovely time in Year 3*’ or ‘*the school dinner was very nice.*’ This type of information is good to know of course but does not demonstrate the **impact** of your visit or your own learning or reflections. You do not need to write ‘War and Peace’ in a link report or prepare a pedagogical discourse on the depth and content of the history curriculum.

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

Things to think about...

1. What link roles do you have now? [statutory, school, trust]
2. Why have you chosen those roles as a focus?
3. Are the right people in the role?
4. How did you choose them? Is it based on the skills audit?
5. What training is available?
6. Have the named governors or trustees the capacity to do the visits?
7. Do staff know what to expect from a governor visit and when to escalate if they think the visit was inappropriate in any way?

Common pitfalls

- Becoming too operational - Link governors are there to provide strategic oversight, not to get involved in day-to-day management. Your job is to ask questions and understand what's happening, not to tell staff what to do or how to do it.

¹⁶ Working together to improve school attendance (applied from 19 August 2024); Chapter 3, para 74

- Not reporting back to the board - Link visits are only useful if the learning and insights are shared with the whole board. If you're doing visits but not writing reports or feeding back at meetings, the board isn't benefiting from your work.
- Writing reports that are too vague - "Everything seems fine" or "I had a lovely time" doesn't tell the board anything useful. Your report should include what you saw, what you asked, what you learned, and any questions or concerns that arose.
- Doing lesson observations - This bears repeating: link governors must not, under any circumstances, observe lessons or make judgements about teaching quality. That's the headteacher's job, not yours.
- Overstepping boundaries - Don't make promises to staff ("I'll make sure the board approves that"), give advice on operational matters, or undermine the headteacher's authority. If staff raise concerns with you, listen respectfully and signpost them to the appropriate person.
- Not preparing for visits - Turn up without a clear focus or agreed questions, and you'll waste everyone's time. Agree the purpose of the visit in advance, prepare your questions, and make sure the member of staff knows what to expect.
- Visiting too often (or not at all) - Link governor visits should be purposeful and proportionate. One or two focused visits per term is usually enough. Turning up every week is micromanaging; never visiting means you're not fulfilling your role.
- Forgetting to follow up - If your visit identifies an issue or an action, make sure it's followed up. Don't just write a report and forget about it.

L is for Listening

Listening attentively is an active governance behaviour, not a passive one.

It's ok to be human. Your mind will wander occasionally during a meeting – we're only human after all. It's perfectly acceptable to ask someone to repeat the question or the last thing they said. But if you're not listening for chunks of the meeting, you'll lose the thread and you won't be able to contribute effectively. If you need help or need someone to speak up, please ask.

In every governance meeting, you'll need to use three types of listening...

- Listen to understand, not just to respond. Are you genuinely trying to understand someone's perspective, or are you just waiting for your turn to speak? Real listening means being curious about views that differ from your own.
- Listen to what's not being said. Sometimes the most important information is what's missing from the conversation. Who isn't speaking? What questions aren't being asked? What's being avoided? What assumptions are we making?
- Listen to the evidence. Data, pupil voice, staff feedback – these all have stories to tell. Are you really hearing what they're saying, or are you listening selectively for what confirms what you already think?

Remember: make space for others to be heard. If you're always talking, you're not listening. Effective governance means creating space for quieter voices – including those beyond the boardroom.

See also: B is for Bias, Q is for Quiet

L is for Looked After Children (LAC)

This is another new important definition that has been included in the Glossary for the first time. Looked After Children (LAC) are children who are in the care of the local authority. Previously Looked After Children (sometimes called Post-LAC or PLAC) are children who were previously in care but have since been adopted, are subject to a special guardianship order, or have a child arrangements order in place.

These are some of the most vulnerable children in our education system, and they often face significant barriers to learning and achievement. As a governing board, you have a responsibility to ensure that LAC and previously LAC children in your school are supported to achieve their full potential.

Why LAC matter

LAC and previously LAC children are more likely than their peers to:

- Have lower educational attainment
- Have special educational needs
- Experience exclusion or persistent absence
- Face social, emotional, and mental health challenges

But with the right support, they can thrive. Schools play a crucial role in providing stability, high expectations, and targeted support.

The Designated Teacher

Every school must have a Designated Teacher for LAC and previously LAC children. This is a legal requirement. The Designated Teacher is responsible for:

- Promoting the educational achievement of LAC and previously LAC children
- Working with the Virtual School Head (see below)
- Ensuring Personal Education Plans (PEPs) are in place and up to date for LAC
- Making sure staff understand the needs of LAC and previously LAC children
- Monitoring the progress and attendance of these children
- Ensuring they have priority access to support and interventions

The Designated Teacher is usually a senior leader, and they should have the time, training, and resources to carry out this important role effectively.

Pupil Premium Plus

LAC attract additional funding called Pupil Premium Plus (currently £2,530 per child per year). This funding is managed by the Virtual School Head and is used to support the child's education, as set out in their Personal Education Plan (PEP).

Previously LAC children also attract Pupil Premium Plus (currently £2,530 per child per year), which is paid directly to the school. The school decides how to use this funding, but it must be used to support the educational needs of previously LAC children.

Service Pupil Premium

Children whose parents are serving in the armed forces, or are veterans who have left the armed forces in the last few years, attract **Service Pupil Premium** (currently £335 per child per year). This funding is paid directly to the school and is intended to support the pastoral and educational needs of service children, who may face challenges such as:

- Parental deployment and separation
- Frequent moves and changes of school
- Anxiety about a parent's safety
- Difficulty forming friendships due to mobility

Schools should use Service Pupil Premium to provide targeted support, such as pastoral care, transition support, or enrichment activities that help service children feel settled and supported.

Virtual School Heads

- Every local authority has a Virtual School Head (VSH) who is responsible for promoting the educational achievement of LAC in their area. The VSH works with schools, social workers, and

carers to ensure LAC get the support they need. They also manage the Pupil Premium Plus funding for LAC.

- The Designated Teacher should have a good working relationship with the VSH and should involve them in decisions about the education and support of LAC.

What governors need to know

- Who is our Designated Teacher for LAC? Make sure you know who they are and that they have the time, training, and support to do the role effectively.
- How many LAC and previously LAC children do we have in school? You don't need to know their names, but you should know the numbers and any patterns or trends.
- What are the outcomes for LAC and previously LAC children in our school? How does their progress, attainment, attendance, and behaviour compared to their peers? Are there any gaps or concerns? Again, you do not need to know the details although your safeguarding governor may have more insights.
- How are we using Pupil Premium Plus funding? For previously LAC children, how is the school using the funding, and what impact is it having?
- Are Personal Education Plans (PEPs) in place and up to date? For LAC, PEPs should be reviewed at least termly and should set out clear targets and support.
- What training have staff had? Do staff understand the needs of LAC and previously LAC children, and do they know how to support them?

Questions to ask

1. How many LAC and previously LAC children do we have, and what are their outcomes compared to their peers?
2. What support is in place for LAC and previously LAC children, and how do we know it's working?
3. How are we using Pupil Premium Plus funding for previously LAC children, and what impact is it having?
4. How does our Designated Teacher work with the Virtual School Head and social workers?
5. Are there any LAC or previously LAC children at risk of exclusion or persistent absence, and what are we doing to support them?

See also: P is for Pupil Premium, D is for Designated Teacher (if you have it), S is for Safeguarding, I is for Inclusion

L is for Local Governing Body/Board (LGB) – academies only

In a multi-academy trust (MAT), a Local Governing Body or Local Governing Board (LGB) is the governance layer at individual school level. LGBs sit below the trust board in the governance structure and have delegated responsibilities for their school, as set out in the trust's Scheme of Delegation.

What is an LGB?

An LGB (or other names for the local layer of governance) is not a legal entity. The trust board is the legal body responsible for all the schools in the trust. The LGB operates under delegated authority from the trust board and can only do what the Scheme of Delegation allows it to do.

Think of it like this: the trust board holds all the power and responsibility, and it chooses to delegate some of that power to LGBs to carry out certain functions at school level. But the trust board remains ultimately accountable.

What does an LGB do?

The role and responsibilities of an LGB vary from trust to trust, depending on what the trust board has delegated.

Common responsibilities include:

- Monitoring the performance of the school (pupil outcomes, attendance, behaviour, safeguarding)
- Supporting and challenging the headteacher
- Ensuring the school reflects the trust's vision and values
- Engaging with the local community and stakeholders
- Monitoring the use of resources (e.g., Pupil Premium, SEND funding)
- Overseeing the implementation of trust policies at school level

What LGBs don't usually do:

- Employ staff (the trust is the employer)
- Set the budget (the trust board sets the budget, though LGBs may monitor spending)
- Approve policies (the trust board approves policies, though LGBs may adapt them for local context)
- Make strategic decisions for the trust (that's the trust board's job)

Check your Scheme of Delegation to understand exactly what your LGB can and cannot do. This is really important as schemes can differ a lot between trusts.

How does an LGB relate to the trust board?

LGBs report to the trust board and are accountable to them. The trust board should:

- Set clear terms of reference for LGBs
- Provide training and support
- Monitor the effectiveness of LGBs
- Intervene if an LGB is not functioning effectively

Some trusts have trustee link roles, where a trustee is linked to each school and attends LGB meetings to provide support and oversight.

Common misconceptions

There's often confusion about what LGBs can and cannot do, and what their relationship with the trust board actually means. Let's clear up some of the most common misunderstandings:

- *"We're just like a governing body in a maintained school."* No, you are not – you have delegated authority, not legal responsibility. The trust board is ultimately accountable.
- *"We can make our own decisions."* Only within the limits of what the Scheme of Delegation allows. If in doubt, check with the trust.
- *"We don't need to follow trust policies."* Yes, you do. Trust policies apply to all schools in the trust, though there may be some flexibility for local adaptation.
- *"We are not answerable to the Trust because we don't want to be part of the Trust"* Yes, you are. When your school joined the trust, governance responsibilities transferred to the trust board. You operate under their delegated authority, whether you like it or not!

L is for Lone Working

Lone working is a safeguarding and health and safety concern that governors and trustees need to be aware of – both for staff and for themselves.

Governors and lone working

Governors should never be alone with a pupil. This is a fundamental safeguarding principle. If you're visiting school and find yourself alone with a child, politely excuse yourself and find a member of staff.

Why? Because being alone with a child puts both you and the child at risk:

- It puts the child at risk if you have not been properly vetted or if you behave inappropriately
- It puts you at risk of allegations, even if you've done nothing wrong

Even if you have an enhanced DBS check, you should not be alone with a pupil. If you need to speak to a pupil (e.g., as part of a pupil voice exercise), make sure a member of staff is present or that you're in a visible, open space. KCSIE 2026 requires checks on volunteers for exactly this reason,

Staff and lone working

Staff should also avoid being alone with pupils wherever possible, particularly in situations where there is no visibility (e.g., in a closed room, off-site, or after school). Schools should have a lone working policy or guidance that sets out:

- When staff can and cannot be alone with pupils
- What precautions should be taken (e.g., leaving doors open, working in visible spaces)
- How to manage situations where lone working is unavoidable (e.g., one-to-one tutoring, medical care)

Staff working alone on site (e.g., caretakers, cleaners, or teachers working late) should also have appropriate risk assessments and safety measures in place, such as:

- Signing in and out
- Checking in with someone when they leave
- Having access to a phone or alarm
- Ensuring the site is secure

Visits and lone working

When you visit school as a governor, trustee or clerk/Governance Professional:

- Always sign in and wear a visitor badge or ID
- Never be alone with a pupil
- Make sure staff know where you are and what you're doing
- If you're doing a visit with a member of staff, stay with them – don't wander off
- If you're visiting after school hours, make sure someone knows you're there and when you're leaving

Why this matters

Lone working is a safeguarding issue. It's about protecting children, protecting staff, and protecting you. Schools should have clear policies and procedures, and governors should follow them.

If you're ever unsure about whether a situation is appropriate, ask. And if you see a member of staff or a governor in a situation that raises concerns, speak to the headteacher or Designated Safeguarding Lead.

Questions to ask

1. Do we have a lone working policy for staff, and is it being followed?
2. Are staff clear about when they can and cannot be alone with pupils?
3. What risk assessments are in place for staff working alone on site (e.g., caretakers, cleaners)?
4. Do governors and visitors understand that they should never be alone with a pupil?
5. How do we ensure that one-to-one work with pupils (e.g., tutoring, music lessons) is conducted safely?

6. Do any of our governors or trustees live alone? If so do they have someone to check in with that they have arrived home safely. Ditto for your clerk.

See also: S is for Safeguarding, K is for KCSiE, H is for Health and Safety, V for Volunteer

M is for Maintained School

There are differences between a maintained school governing body and a school that is in an academy trust. These differences revolve around the governance structure, responsibilities and the level of autonomy they have and funding.

A maintained school is a state school provided and financed by the local authority (or equivalent education authority), as opposed to an academy/free school (funded directly by the DfE) or an independent/public school which is fee paying. The main governance differences are that there are no Local Authority governors in an academy trust.

This is a useful article on [Governance Styles: Maintained Schools Versus Academies](#) and there is more information on the DfE website.

If you are governing in a maintained school please familiarise yourself with [the Maintained schools: governance guide](#). The guidance was updated in July 2026 (something the Glossary's author was unaware of as it was the end of term!)

M is for Managed Move

A managed move is a permanent transfer to another mainstream school, with the agreement of all parties – the pupil, their parents/carers, the current school and the receiving school's admission authority. It should only happen when it is genuinely in the pupil's best interests and must be voluntary – parents and pupils should not be pressured.

The governor's role

Governors must ensure that:

- Managed moves are used appropriately and in the pupil's best interests, not to manipulate data or avoid exclusion processes
- The school distinguishes correctly between managed moves (permanent) and off-site direction (temporary)
- Off-rolling does not happen
- Safeguarding information is shared appropriately during transitions
- Pupil movements are properly monitored and patterns are identified

Key distinctions

- Managed move = permanent transfer to another mainstream school
- Off-site direction = temporary placement as a planned intervention (not a "trial managed move")
- Off-rolling = removing pupils inappropriately to serve the school's interests rather than the pupil's

A managed move or off-site direction is **not** automatically off-rolling if it's genuinely in the pupil's best interests and follows proper processes.

Red flags

- Frequent or unusually high numbers of pupil moves
- Clusters involving SEND pupils or linked to performance data
- "Trial managed moves" instead of proper off-site direction
- Pupils disappearing from the roll without clear records
- Off-site placements continuing without review

Questions governors should ask

1. How many managed moves and off-site directions have we had? Are there patterns (e.g., SEND pupils, particular year groups)?
2. How do we ensure managed moves are genuinely voluntary and in pupils' best interests?
3. What are the outcomes? Do pupils settle and succeed at their new school?
4. How is safeguarding information shared with the receiving school?
5. Do staff and governors understand the difference between managed moves, off-site direction, permanent exclusion and off-rolling?

The key question: *Why are pupils moving, was the correct process followed, and is each move genuinely in the pupil's best interests?*

Top Tips

- Seek external advice from your LA, trust or education professionals if you're unsure about pupil movement
- Ensure the clerk is trained to advise on statutory guidance
- Undertake training yourself – this is complex safeguarding territory
- If you have concerns about possible off-rolling, raise them with the headteacher or chair

Key guidance: [Suspension and permanent exclusion, including pupil movement](#) · [Keeping Children Safe in Education 2026](#) · [Children Missing Education](#)

See also: A is for Attendance, E is for Exclusion O is for Off-rolling, S is for Safeguarding, ,

Top Tip

Governors and trustees should seek external advice from their local authority, trust or other appropriate professional where they are unsure about pupil movement, and ensure that the clerk is sufficiently trained and supported to advise the board on the relevant statutory guidance and governance responsibilities. They should also undertake training themselves.

M is for Master Funding Agreement

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

M is for Meetings

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

Any conversation about the school/trust between two or more governors could be considered a meeting, and a record should be kept even if formal minutes are not taken. The pandemic highlighted the role, purpose, and organization of meetings, leading many boards to continue holding some meetings online. This is good for the planet!



Most boards must meet a minimum of 3 times per year. Members of Academy Trusts are only required to meet once per year (at the AGM), though many trusts are choosing to hold Members' meetings more frequently to improve communication and oversight.

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

All governors/trustees can have sight of all minutes apart from the confidential ones. Confidential minutes are only for those who attended that particular meeting. There are times when it is good not to know what was discussed - for example, if you might need to sit on an appeal or disciplinary panel, you need to come to it without prior knowledge to remain impartial.

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

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

Remember: If a governor or trustee is looking at their phone during a meeting, they may well be reading the papers — not playing Tetris. Increasingly, people access meeting packs on phones or tablets, so papers need to be easy to find, open and navigate. Clear headings, sensible file names and working links are not just nice-to-haves; they help governors navigate the documentation.

M is for Members (academy trusts only)

Members are the guardians of the trust's governance. They sit at the top of the governance structure (the top layer of the governance "cake"), and their role is to:

- Hold the trust board to account for its performance
- Appoint and remove trustees
- Approve changes to the trust's Articles of Association
- Appoint the trust's external auditors
- Attend the Annual General Meeting (AGM)

Members are not trustees, and they should not be involved in the day-to-day running of the trust or its schools. Their role is one of oversight and accountability, not operational management.

How many Members must a trust have?

Every academy trust must have at least three Members at all times. Some trusts have more (often five), but three is the minimum.

The resignation trap

Here's something really important that many people don't know: if you are a Member and you try to resign, but your resignation would leave only two Members, your resignation is not valid. The trust must have at least three Members at all times, so even if you think you've resigned in these circumstances, you probably haven't!

This means:

- If you want to resign as a Member, give fair warning so the trust has time to appoint a replacement
- Keep your contact details up to date with the other Members and the Governance Professional, and check your emails regularly – you may still be a Member even if you thought you'd resigned
- The Governance Professional will be able to advise you on the correct procedure for resigning

Appointing and resigning as a Member

The procedures for appointing and resigning as a Member are different from those for trustees. The process is set out in the trust's Articles of Association, and the Governance Professional or Company Secretary will be able to guide you through it.

Why the Members' role matters

Members have significant power, including the ability to remove trustees and change the trust's constitution. Because of this, it's essential that:

- Members understand their role and responsibilities
- Members are independent and able to hold the trust board to account
- There is clear separation between Members and trustees (though in some trusts, the chair of trustees may also be a Member – check your Articles)

If you're a Member, make sure you understand your role, attend the AGM, and stay engaged with the trust's work. It's a small but crucial role in ensuring effective governance.

See also: A is for AGM, A is for Articles of Association, T is for Trustee, G is for Governor (

M is for Micromanaging

Micromanaging undermines leaders and makes governance ineffective. If you're asking about the colour of the carpet, you've crossed the line. Focus on the big picture. If you're asking about the colour of the carpet or the font size on the newsletter, you are micromanaging. Your job as a governor is strategic oversight, not operational detail. Ask yourself: *does this decision affect pupil outcomes, financial sustainability, or safeguarding? If not, it's not your job.*

Micromanaging undermines leaders, wastes time, and makes governance ineffective. It can also make you deeply unpopular. Trust your headteacher to run the school. Focus on the big picture. And if you're worried that stepping back means you're not doing your job properly, you've misunderstood what governance is.

A key sign of micromanagement in action is where there are 25 actions for the headteacher in the minutes and 4 for the governors. True story.

M is for Minutes

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

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

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

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

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

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

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

Top Tips

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

M is for Monitoring

Monitoring is one of the core functions of governance. It's how you know whether the school is doing what it said it would do, whether policies are being followed, whether money is being spent wisely, and whether pupils are making progress. Monitoring is not the same as evaluation – monitoring is about checking what's happening now, while evaluation is about judging the impact and effectiveness of what's been done. Good monitoring is regular, focused, and linked to your School Improvement Plan and strategic priorities. It should tell you whether things are on track, or whether the board needs to intervene.

Monitoring should be purposeful and proportionate. You're not there to check up on every detail or second-guess operational decisions – that's micromanaging, not monitoring. Instead, focus on the things that matter most: pupil outcomes, safeguarding, financial health, staff wellbeing, and progress against your strategic priorities. Use data, reports, visits, and questions to build a picture of how the school is doing. And

remember, monitoring is only useful if you act on what you find. If the data shows a problem, or a visit raises concerns, or a report highlights a risk, the board needs to respond – whether that's asking more questions, requesting further information, or holding leaders to account.

Top Tips

- Link monitoring to your strategic priorities. Don't try to monitor everything – focus on what matters most and what's in your School Improvement Plan.
- Use multiple sources of information. Don't rely on one report or one visit. Triangulate data, reports, and first-hand observations to get a full picture.
- Make sure monitoring leads to action. If you're monitoring but not doing anything with the information, you're wasting everyone's time. Monitoring should inform decisions, challenge, and support.

See also: E is for Evaluation, K is for Knowing Your School, L is for Link Governor, V is for Visits.

N is for National

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

The word "national" appears in various education terms you may hear during meetings. National Leaders of Education (NLEs) and National Leaders of Governance (NLGs) were experienced headteachers and governors who supported other schools. NLGs, for example, supported schools by undertaking External Reviews of Governance and, until August 2021, by offering free mentoring to headteachers and chairs. The formal NLG designation no longer exists, though experienced governors and governance professionals continue to provide similar support through other routes such as Independent Governor Support.

National Professional Qualifications (NPQs) are the professional qualifications undertaken by school staff to develop their leadership skills. You may hear staff or leaders referring to NPQs such as NPQ for Headship (NPQH) or NPQ for Senior Leadership (NPQSL).

See also: D is for Data, E is for External Review

N is for Networking

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

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

Remember no governor, trustee or board is an island.

See also: C is for Context

N is for Noise (Making Some)

Making noise is about external advocacy - speaking up to those outside your school or trust about systemic issues, policy concerns, or funding pressures. It is NOT about individual governors complaining to the chair, undermining leaders, or causing internal disruption. That's not making noise - that's just being difficult.

Making noise is also about belonging. It's about advocating for pupils, families, and communities who might not have a voice themselves - ensuring they belong in the education system and aren't left behind. It's about speaking up when policies or decisions exclude or marginalise certain groups. And it's about recognising that

your school doesn't exist in isolation - sometimes making noise together as boards, trusts, or networks is more powerful than making it alone.

The difference between Noise, Quiet, and Bravery Quiet is about making space for voices that aren't always heard - including your own if you're naturally quiet Bravery is about having difficult conversations within the board, challenging leaders, and doing the right thing even when it's hard Noise is about using your voice externally - advocating, campaigning, and speaking up about things that matter beyond your boardroom.

N is NOT for Nobody

There is no such thing as "nobody" on a governing board.

Every governor and trustee matters. Every voice counts. Every vote is equal. Whether you've been on the board for ten years or ten minutes, whether you're the chair or a newly appointed co-opted governor, you are not nobody.

If you feel like nobody listens to you, or your contributions don't matter, or you're just there to make up the numbers, something is wrong. Speak up. Talk to the chair, the clerk, or another governor you trust. Good governance depends on everyone bringing their perspective, their questions, and their challenge to the table.

And if you see another governor or leader making someone feel like a nobody - by talking over them, dismissing their questions, or treating them as less important than other board members - call it out. Good governance depends on everyone feeling valued and heard. Don't let poor behaviour go unchallenged.

See also: J is for Just, C is for Collective Responsibility, C is for Challenge, K is for Kindness

N is for No-show

Governor and trustee attendance at meetings must be published on the school website, so your presence (or absence) is a matter of public record.

It is always advisable (and good manners) to send your apologies in advance if you cannot attend a meeting, to both the chair and the clerk. Apologies do not have to be accepted, but any that are received must be noted in the minutes. If you are a no-show without apology for 6 months, you will be automatically removed from the board.

Why wouldn't apologies be accepted?

Apologies might not be accepted if no reason is given, or if there's a pattern of vague excuses ("I'm busy") or last-minute cancellations that suggest lack of commitment rather than genuine unavoidable circumstances. Valid reasons include illness, work commitments, caring responsibilities, bereavement, or unavoidable clashes. The key is pattern and commitment - one or two absences with good reason are fine, but regular absence without genuine obstacles is not. In practice, most boards accept apologies unless there's a clear pattern of non-attendance. The real consequence comes at the 6-month mark when someone is automatically removed.

Being present but absent

You can also be a no-show even when you are present in a meeting. This happens when you don't ask questions, don't participate in discussions, or don't offer to do anything. Being a no-show - physically or mentally - is not fair on the other governors or trustees who are doing all the work.

If you're struggling for any reason, ask for help from the chair, vice chair, or clerk. You can also seek support from governance networks, social media groups like School Governors UK, or other governors you trust - but always remember confidentiality. The headteacher or CEO can advise too, but remember they are busy people.

If you're consistently finding you can't attend or engage, it might be time to step down and make way for someone who can commit to the role.

See also: C is for Commitment, K is for Kindness, and W is for Wellbeing

O is for Obvious

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

See also: B is for Bravery, C is for Curious

O is for Off Rolling

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

See also: M is for Managed Move

Top Tip

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

O is for Ofsted

Ofsted is the Office for Standards in Education, Children's Services and Skills. It inspects and regulates services that care for children and young people, and services providing education and skills for learners of all ages.

Getting familiar with Ofsted

Read your school's last Ofsted report and be aware of when the next inspection could take place. Schools are typically inspected every 3-4 years, but this can vary depending on your current grade and any concerns that arise.

The new grading system (from September 2025)

Ofsted no longer gives one overall judgement. Instead, report cards show colour-coded grades for different evaluation areas on a new scale:

- 'exceptional'
- 'strong standard'
- 'expected standard'
- 'needs attention'
- 'urgent improvement'

Safeguarding is graded separately as either 'met' or 'not met'. These new grades can't be compared to the old system - this is a different approach to inspection.

Key evaluation areas

Ofsted inspects schools against these areas:

- Quality of Education - the curriculum, teaching, and assessment
- Behaviour and Attitudes - pupils' behaviour, attitudes to learning, and attendance
- Personal Development - pupils' wider development, including their character, resilience, and preparation for life in modern Britain
- Leadership and Management - this is where governance sits. Inspectors will look at how well leaders (including governors and trustees) are driving improvement and ensuring the school is effective

What Ofsted looks at in governance

Inspectors will:

- Review your minutes to see evidence of challenge, strategic focus, and oversight
- Speak to governors and trustees (often the chair and others) to understand what you know about the school and how you hold leaders to account
- Check that you're meeting your statutory duties (safeguarding, policies, financial oversight, etc.)
- Look for evidence that governance is having an impact on school improvement

How to prepare

- Know your data - understand pupil outcomes, attendance, behaviour, and any gaps or trends
- Know your school - visit regularly, talk to staff and pupils, understand the context
- Be able to articulate the board's impact - what difference has governance made? What have you challenged? What have you improved?
- Make sure your minutes are good - they should show evidence of challenge, strategic thinking, and decisions, not just rubber-stamping
- Check your statutory compliance - policies, safeguarding, website requirements, etc.
- Don't panic - you won't have to meet Ofsted on your own and you won't let the side down if do you preparation and pre-reading. You can take notes in with you.

Remember: we are not governing for Ofsted

Boards should not let Ofsted be their sole driver. You are governing for the pupils, the community, and the long-term success of the school. Ofsted is important, and you need to be fully aware of their requirements, but good governance is about much more than preparing for inspection. If you're doing your job well - asking the right questions, holding leaders to account, and focusing on outcomes - you'll be ready for Ofsted whenever they arrive.

Main Ofsted Resources

- Ofsted homepage <https://www.gov.uk/government/organisations/ofsted>
- Understanding Ofsted report cards and grades (the one you mentioned in your text) <https://www.gov.uk/government/publications/understanding-ofsted-report-cards-and-grades>
- School inspection handbook (the main guide for how inspections work) <https://www.gov.uk/government/publications/school-inspection-handbook-eif>
- Find your school's Ofsted report <https://reports.ofsted.gov.uk/>

Key Guidance Documents:

- When Ofsted inspects schools (inspection frequency information) <https://www.gov.uk/guidance/being-inspected-as-a-maintained-school-or-academy>
- Ofsted's expectations for governance (within the School Inspection Handbook - see section on Leadership and Management) <https://www.gov.uk/government/publications/school-inspection-handbook-eif>

- Preparing for an Ofsted inspection <https://www.gov.uk/guidance/being-inspected-as-a-maintained-school-or-academy>

Ofsted also has a range of videos on You Tube...

See also: S is for Statutory Duties, M is for Minutes, C is for Challenge, O is for Outcomes

O is for One of Those Days

You know the ones. The meeting that goes off the rails. The policy that should have been reviewed six months ago. The email from Ofsted about a complaint. The budget that doesn't balance. The governor who hasn't read the papers. Again. Take a breath. Make a cup of tea. Remember why you're doing this. Tomorrow will be better. Promise. Reach out to [Independent Governor Support](#) (IGovS) for a free listening ear.

In the spirit of openness O is for One of Those Days was an entry suggested by The Key GTP!

O is for Openness

Openness is one of the seven Nolan Principles of Public Life. It means being transparent about decisions, actions, and the reasons behind them. In governance, openness is essential for building trust and accountability.

What openness means in practice:

- Transparent decision-making - making sure decisions are recorded, explained, and available for scrutiny
- Publishing information - meeting your requirements to publish minutes, policies, governance information, and financial data on your website
- Being accessible - making sure parents, staff, and the community know who the governors are and how to contact them
- Honest communication - being open about challenges, risks, and difficult decisions, not just successes
- Welcoming scrutiny - being prepared to explain and justify decisions to stakeholders, Ofsted, and the public

Openness doesn't mean sharing everything - some information is confidential, and rightly so (e.g., safeguarding concerns, personnel matters, commercially sensitive information). But it does mean being as transparent as possible within those boundaries, and being able to explain why certain information is confidential.

O is for Outlier

In statistics, an outlier is a data point that differs significantly from the other observations. It might be the result of an error or unusual variation, but it might also be telling us something important. In school data, an outlier is often where the interesting story is hiding.

So, when you are presented with data, don't just look at the headline figures. Ask: Are there any outliers? What is driving them? And what can we learn from them?

Perhaps one year group has results that are dramatically better—or worse—than the others. Perhaps attendance in one class is unusually low. Perhaps a particular group of pupils is doing something very different from the overall picture. Before dismissing the figure as an anomaly, find out what sits behind it.

Small cohorts need particular care. If there are only ten pupils in a group, one pupil represents 10%. A single absence, exclusion, or change in circumstances can therefore have a disproportionate effect on the percentages. Comparing small cohorts with larger groups without understanding this can lead to some very misleading conclusions.

Outliers are not necessarily problems to be explained away. Sometimes they are case studies waiting to be understood. They can reveal an error in the data, an unusual circumstance, a successful intervention—or a problem that the headline figures are hiding.

As governors, our job isn't simply to ask, "What is the percentage?" It is to ask, "What is the story behind the number?"

Top Tip

Think – what stands out? Ask why.

O is for Oversight

Governors and trustees need to have oversight - a clear, strategic view of what's happening in the school without getting involved in the day-to-day operational detail. Oversight means knowing enough to ask the right questions and hold leaders to account, but not so much that you're micromanaging.

You should not be discussing operational matters, but you do need to be aware of what the operational matters are so that you understand the boundary and don't cross it. Your introduction to governance training will go into this in more detail. Alongside oversight, you also need insight (understanding the context and what the data really means), hindsight (learning from what's happened before), and foresight (anticipating risks and opportunities). Being prepared helps with all of these.

Active vs passive governance

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

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

- Reactive not proactive
- Rubber-stamping decisions
- Over-reliance on management
- Minimal strategic engagement (e.g., a trust board that looks at detail an LGB should be scrutinising, rather than taking a trust-wide view)
- Limited challenge, or challenge that's about process not outcome
- A tick-box mentality with a short-term focus only

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

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

	Active Governance	Passive Governance
Questioning and Challenge	Asks probing, evidence-based questions; tests assumptions; seeks clarification	Accepts reports and recommendations without question; rubber-stamps decisions
Strategic Oversight	Focuses on long-term goals, vision, and school improvement; connects decisions to strategy	Concentrates on operational details or immediate issues only; lacks strategic focus
Accountability	Holds leaders to account for pupil outcomes, finances, safeguarding, and compliance	Rarely checks performance or follows up on actions; assumes all is fine
Evidence Use	Reviews data from multiple sources; triangulates information; tracks KPIs and impact	Relies solely on information provided by leaders; does not verify or analyse evidence

Risk Management	Identifies, discusses, and mitigates risks; actively monitors compliance	Ignores or is unaware of potential risks; assumes risk is being managed
Board Engagement	Participates fully in meetings; contributes to discussions; prepares in advance	Minimal participation; attendance without contribution; unprepared
Culture and Improvement	Encourages continuous improvement; constructive challenge; models high expectations	Low engagement; avoids difficult conversations; misses opportunities to influence culture
Documentation	Minutes accurately reflect discussion, challenge, and decisions; clear actions assigned	Minutes show agreement only; little or no reflection of discussion or questioning

See also: C is for Challenge, M is for Micromanaging, M is for Monitoring, S is for Strategic

O is for Outcomes

Outcomes are what matters most. Everything the school does - the curriculum, the teaching, the behaviour policy, the spending decisions, the staffing structure - should ultimately be focused on improving outcomes for pupils.

But what do we mean by "outcomes"? It's not just exam results or test scores, though those are important. Outcomes include:

- Academic outcomes - attainment (the grades pupils achieve) and progress (how much they've improved from their starting points)
- Personal development outcomes - pupils' character, resilience, confidence, and readiness for the next stage of their lives
- Wellbeing outcomes - pupils' mental and physical health, sense of belonging, and happiness
- Destination outcomes - where pupils go next (further education, employment, training) and how well they do there

When you're asking questions about outcomes, remember:

- Context matters - a school in a deprived area achieving national average results may be doing better than a school in an affluent area achieving above average
- Progress matters more than attainment - it's not just about where pupils end up, but how far they've travelled
- All pupils matter - don't just focus on the high achievers or those on the borderline. Ask about disadvantaged pupils, SEND pupils, vulnerable groups, and those who are coasting
- Outcomes take time - don't expect overnight miracles. Look for trends over time, not just one year's results

Questions to ask about outcomes:

1. How do our outcomes compare to national averages? To similar schools?
2. Are there any gaps between different groups of pupils (e.g., disadvantaged vs non-disadvantaged, boys vs girls, SEND vs non-SEND)?
3. What is our progress data telling us? Are pupils making expected progress from their starting points?
4. What are we doing to close any gaps, and is it working?
5. What do our destination data tell us? Are pupils going on to appropriate next steps and succeeding there?

See also: D is for Data, P is for Progress, P is for Pupil Premium

P is for Pay

A ministerial statement relating to teachers' pay was published on 1 July 2026, confirming that the Government had accepted the School Teachers' Review Body (STRB's) 36th Report pay recommendations for the 2026/27, 2027/28 teacher pay award with an indicative increase for 2028/29. The headline multiyear pay recommendations are:

- From 1 September 2026 a 3.5 per cent increase will be applied to all pay and allowance ranges and advisory points, except for the minimum of the unqualified teacher range (rest of England) where a five per cent increase will be applied
- From 1 September 2027 a three per cent increase will be applied to all pay and allowance ranges and advisory points
- The STRB also recommended an indicative increase of three per cent to all teachers pay ranges and allowances for 2028/29

Note: Not all academy trusts follow the STPCD but most do.

Funding for 2026/27 and 2027/28

The Government has explained that schools will be expected to find productivity gains and apply smarter spending (first one per cent); the next portion comes from schools' existing budgets as per DfE affordability assessment and the remainder is funded by additional new money i.e. part of the £700m that was announced.

In 2027-28, the same principles will apply: the first one per cent from maximising value in schools' budgets, the next portion from existing budgets as per the School Costs Technical Note (SCTN) and the remainder covered by additional funding of £1.1bn.

What this means for governors and trustees

Pay is one of the biggest items in any school budget - typically 70-80% of total spending. As a governor or trustee, you need to understand:

- How pay decisions are made - maintained schools must follow the School Teachers' Pay and Conditions Document (STPCD). Academies can choose to follow the STPCD or set their own pay arrangements, but most follow it
- Your school's pay policy - all schools must have a pay policy that sets out how pay decisions are made, including pay progression, performance management, and appeals. The board must approve this policy
- The affordability of pay awards - when the government announces pay increases, you need to ask: is this fully funded, or will we need to find savings elsewhere? What's the impact on our budget?
- Pay progression - staff don't automatically get pay increases. Pay progression is linked to performance management, and the board (or pay committee) approves recommendations for pay increases
- Equal pay - the board must ensure the school's pay policy and practices comply with the Equality Act 2010 and don't discriminate

Your role as a governor or trustee

You are not involved in individual pay decisions for most staff - that's operational and confidential. But you do need to:

- Approve the pay policy and make sure it's fair, transparent, and compliant with the law
- Approve the overall pay budget as part of the school budget
- Monitor pay spending - is it within budget? Are there any risks or pressures?
- Approve pay recommendations for senior leaders (headteacher, deputy heads, and in some cases other senior staff)

- Ensure performance management is linked to pay - staff should understand what they need to do to progress up the pay scale.

In maintained schools, you must have a pay committee to make recommendations on pay to the full governing board. Parent governors can sit on the pay committee, but staff governors cannot (for obvious reasons - they would be making decisions about their own pay).

In academies, you may have a pay committee or a remuneration committee (often for senior leaders' pay). Check your Scheme of Delegation to understand who makes pay decisions and what needs to come to the board.

Questions to ask

1. Do we have an up-to-date pay policy (including Executive Pay policy in an academy trust), and does it comply with the STPCD (if we follow it)?
2. How much of our budget is spent on pay, and is this sustainable?
3. How are we funding the government's pay award - is it fully funded, or do we need to make savings?
4. How does our pay compare to similar schools (benchmarking)?
5. Are pay decisions linked to performance management, and is the process fair and transparent?
6. Are there any equal pay risks or concerns?

Your School Business Manager, trust finance lead, or Local Authority will be able to provide you with more detailed information about pay budgets and affordability. Ask for help and advice if you are not sure.

See also: P is for Performance Management and Appraisal, F is for Finance, B is for Budget

P is for Pecuniary and Business Interests

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

Maintained school governors¹⁷ must declare (and this must also be published on the school website)

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

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

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

This includes (but is not limited to):

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

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

¹⁷ [The constitution of governing bodies of maintained schools](#)

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

See also: C is for Conflicts of Interest; G is for Gifts and Hospitality

P is for Performance Management and Appraisal

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

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

It is worth trying to find training on performance management and appraisal if you have not done any before. The National Governance Association¹⁸ offer some free webinars as do other providers so it is worth investigating.

Top Tips

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

P is for Period Poverty

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

P is for Persistent Absence

As well as asking about overall attendance and lateness, governors should also be asking about the number of pupils who are classed as persistently absent.

What is persistent absence?

A pupil is classified as persistently absent if they miss 10% or more of their possible sessions (morning and afternoon sessions count separately). This means missing approximately one day per fortnight, or around 19 days across a full academic year. Persistent absence is a serious concern because it has a significant impact on pupils' learning, progress, and wellbeing.

Why it matters

Pupils who are persistently absent:

- Fall behind in their learning and struggle to catch up
- Miss important social interactions and relationships with peers
- Are at greater risk of disengagement from school
- May face safeguarding concerns (persistent absence can be a sign of neglect, exploitation, or other issues at home)

¹⁸ [Impactful executive leader performance management | National Governance Association \(nga.org.uk\)](#)

As a governor or trustee, you need to understand not just the overall attendance figure for your school, but how many pupils are persistently absent and what's being done to support them.

What to ask

1. How many pupils are persistently absent, and are there any patterns (e.g., particular year groups, disadvantaged pupils, SEND pupils)?
2. What are the reasons for persistent absence? Is it illness, family circumstances, school refusal, or something else?
3. What interventions are in place to support persistently absent pupils and their families?
4. How are we working with external agencies (e.g., the Local Authority, social care, health services) to address persistent absence?
5. Are there any safeguarding concerns related to persistent absence?

Where to find more information

The DfE publishes useful background information and headline facts and figures on pupil absence, which provide a helpful benchmark for understanding how your school compares nationally. You may also find *Working together to improve school attendance* (last updated in July 2026) a useful read. Chapter 3 sets out the expectations of academy trust boards and governing bodies of maintained schools. You can find the document [here](#) and Chapter 3 is a key read as set out expectations of academy trust boards and governing bodies of maintained schools.

See also: A is for Attendance, S is for Safeguarding

P is for Phishing

Phishing is a type of cyber-attack where criminals send fraudulent emails, text messages, or other communications pretending to be from a trusted source (like your bank, a supplier, a government department, or even your school or trust) in order to steal sensitive information, money, or access to systems.

Schools and trusts are increasingly targeted by phishing attacks because they hold valuable data (pupil and staff personal information, financial systems, payroll) and often have less sophisticated cyber security than larger organisations. A successful phishing attack can lead to data breaches, financial loss, and significant disruption to the school. Some useful articles including a real example;

- [Derbyshire pupils miss school after 'brute force attack' shuts down IT systems](#)
- [Insider threat of students leading to increasing number of cyber-attacks in schools | ICO](#)
- [Map | CyberSafeSchools](#)

What does phishing look like?

Phishing emails or messages often:

- Create a sense of urgency ("Your account will be suspended unless you act now!")
- Ask you to click on a link or download an attachment
- Request personal information, passwords, or financial details
- Come from an email address that looks legitimate but isn't quite right (e.g., @gov.uk.com instead of @gov.uk)
- Contain spelling or grammar errors
- Offer something that seems too good to be true

Why governors and trustees need to be aware

As a governor or trustee, you may receive emails that appear to be from the school, the trust, or other governors. You might be asked to approve payments, share confidential information, or click on links to documents. If you fall for a phishing attack, you could inadvertently give criminals access to school systems, financial information, or sensitive data about pupils and staff.

How to protect yourself and the school

- Always use your school or trust email address for all governance business. Never use your personal email for school matters - it's less secure and makes it harder to spot phishing attempts. If you don't have a school email address, ask for one.
- Be suspicious of unexpected emails - even if they appear to come from someone you know. If an email asks you to do something unusual (like approve a payment urgently or click on a link), verify it by contacting the sender directly using a phone number or email address you already have (not the one in the suspicious email).
- Don't click on links or download attachments unless you're absolutely sure they're legitimate. Hover over links to see where they really go before clicking.
- Never share passwords or sensitive information via email or text. Legitimate organisations will never ask you to do this.
- Report suspicious emails to your school's IT team or trust central team immediately. Don't just delete them - reporting helps protect others.
- Use strong, unique passwords and enable two-factor authentication (2FA) wherever possible.

The board's role in cyber security

Cyber security is a governance issue, not just an IT issue. The board should:

- Ensure the school or trust has a cyber security policy and incident response plan
- Make sure all staff (including governors and trustees) receive regular cyber security training
- Ask about cyber security risks and controls as part of financial and information governance oversight
- Know what to do if there's a cyber security incident (who to contact, how to report it, how to manage the fallout)

Questions to ask

1. Do we have a cyber security policy and incident response plan?
2. When did staff and governors last receive cyber security training?
3. Have we had any phishing attempts or cyber security incidents? How were they handled?
4. What controls do we have in place to protect against phishing and other cyber-attacks?
5. Are we compliant with data protection requirements around cyber security?

Cyber security might not feel like traditional governance, but in an increasingly digital world, it's essential. One phishing email could compromise your school's finances, data, and reputation. Stay alert, stay safe, and always use your school email address.

See also: D is for Data Protection G is for GDPR, I is for Information Governance

P is for Policy

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

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

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

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

P is for politics with a small p

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

In the Academy Governance Guide there is specific reference to political impartiality and the curriculum. If you are interested there a document called political impartiality in schools (dated March 2025 and still extant) that sets out the role of Local Authorities, school proprietors, academy trusts and headteachers and includes a number of useful hyperlinks and the DfE guidance offers a range of scenarios for you to consider.

P is for Poverty Proofing

Poverty proofing is a process that helps schools identify and remove barriers to learning and participation that are caused by poverty or low income. It involves systematically reviewing your school's policies, practices, and culture through the lens of children and families experiencing financial hardship, and then making changes to ensure that no child is disadvantaged, excluded, or stigmatised because of their family's financial circumstances.

Why it matters

Poverty can have a significant impact on children's educational outcomes, wellbeing, and life chances. Children from low-income families may face barriers that their peers don't experience, such as:

- Cost of school activities – trips, residential visits, music lessons, after-school clubs
- Uniform and equipment costs – including PE kit, specific branded items, technology
- Hidden costs – ingredients for food tech, art materials, charity fundraising expectations
- Social exclusion – not being able to afford the same things as friends, feeling 'different'
- Stigma and shame – being identified as 'free school meal children' or singled out for support

Poverty proofing helps you understand these barriers from the child's perspective and take practical action to remove them.

What does poverty proofing involve?

The process typically includes:

1. Listening to pupils

- Talking to children and young people (particularly those eligible for Pupil Premium or free school meals) about their experiences
- Understanding what makes them feel included or excluded
- Identifying specific barriers, they may face

2. Auditing your school

- Reviewing the cost of the school day – uniform, trips, equipment, activities, fundraising
- Looking at policies and practices – payment systems, rewards, sanctions, homework expectations
- Examining language and culture – how you talk about money, poverty, and support

3. Making changes

This might include:

- Reducing or subsidising costs for trips and activities

- Providing equipment and resources (e.g., PE kits, stationery, ingredients) so families don't have to buy them
- Reviewing uniform policies to reduce costs and avoid branded items
- Ensuring free school meal pupils aren't identifiable (e.g., cashless payment systems, grab-and-go breakfast)
- Avoiding 'bring money in' days or making them optional
- Being mindful of homework tasks that assume access to resources, technology, or parental time
- Reviewing rewards and sanctions that may disadvantage children from low-income families

4. Embedding poverty awareness

- Training staff to understand the impact of poverty and avoid assumptions
- Building a culture where all children feel they belong, regardless of their background
- Regularly reviewing practices to ensure they remain inclusive

The governing board's role

As a governor or trustee, you should:

- Challenge assumptions – don't assume that 'everyone can afford it' or that financial support is always taken up and do not assume that the school are doing nothing if poverty proofing is not mentioned in meetings; adjustments and support are being provided day in day out.
- Review policies – uniform, charging and remissions, trips, homework – through a poverty-proofing lens
- Monitor impact – look at participation rates for trips, clubs, and activities by pupil premium/FSM status. This can be done during link governor visits too. What stands out?
- Ensure Pupil Premium spending addresses barriers to learning, including hidden costs
Champion a culture of inclusion – where no child is disadvantaged or stigmatised because of their family's financial circumstances

Useful questions to ask

1. What does it cost to send a child to our school for a year (including uniform, trips, equipment, etc.)?
2. How do we know that all children can participate fully in school life, regardless of their family income?
3. Are there any activities, trips, or opportunities that children miss out on because of cost?
4. How do we ensure that children eligible for free school meals or Pupil Premium are not identifiable or stigmatised?
5. What feedback have we had from pupils and families about the cost of the school day?
6. How does our uniform policy balance identity and belonging with affordability?
7. Do our homework expectations assume access to resources, space, or parental support that not all families have?

Resources and support

Several organisations provide free poverty-proofing toolkits and guidance:

- Children North East – developed the original Poverty Proofing the School Day toolkit
- Child Poverty Action Group (CPAG) – provides resources on the cost of the school day
- The Education Endowment Foundation (EEF) – guidance on supporting disadvantaged pupils

Many schools have worked with pupils to carry out poverty-proofing audits, leading to practical changes that make a real difference to children's experiences and outcomes.

In practice

Poverty proofing is not about lowering expectations or making excuses. It's about removing barriers so that all children have an equal opportunity to learn, participate, and thrive.

It's about recognising that poverty is not a choice, and that schools have a responsibility to ensure that no child is disadvantaged, excluded, or made to feel 'less than' because of their family's financial circumstances.

And it's about creating a culture where every child feels they belong – regardless of what their parents/carers can afford.

See also: C is for Culture, E is for Equality and Equity, I is for Inclusion, P is for Pupil Premium

P is for Professional

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

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

P is for Prevent

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

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

P is for Primary

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

P is for Proportionality

Proportionality is one of those words that sounds rather grand and official, but in governance it is actually a very practical idea: doing enough, but not doing everything.

Good governance is not about having a board involved in every decision, reading every document, monitoring every possible risk or asking 47 questions just because there are 47 questions that could be asked. It is about making sure the level of scrutiny, challenge, oversight and intervention is proportionate to the issue, the risk and the potential impact.

A board needs to be able to distinguish between something that requires serious scrutiny and something that simply needs to be noted. Not every red flag is a five-alarm fire.

Proportionality also matters when deciding how much information the board needs. More information does not necessarily mean better governance. In fact, an avalanche of information can make it harder to see what really matters. The board should have enough good-quality information to make an informed decision, provide appropriate challenge and gain assurance — without drowning in detail.

The same principle applies to monitoring. If a board spends half an hour discussing a minor issue but only five minutes considering a significant strategic risk, something has probably gone awry. Spending 30 minutes discussing the colour of the new school sign but only 5 minutes on safeguarding is disproportionate. Discuss!

Top Tip

Before adding another report, dashboard, standing agenda item or monitoring activity, ask: *“What are we trying to know, why do we need to know it, and is this the most proportionate way of finding out?”*

Questions to ask:

1. What is the level of risk or potential impact here?
2. How much scrutiny is appropriate?
3. Are we getting the right amount of information — or simply more information?
4. Are we spending our governance time on the things that matter most?
5. What would proportionate oversight look like in this situation?
6. Are we responding to the actual level of risk, or to our anxiety about it?

Remember: Proportionality does not mean doing less. It means doing what is appropriate, for a reason, at the right level and in the right amount.

P is for Psychological Safety

Psychological safety is the shared belief that it's safe to take interpersonal risks – to speak up, ask questions, admit mistakes, and challenge ideas without fear of embarrassment or punishment. In governance, psychological safety means that both governors and leaders feel able to raise concerns, ask 'difficult' questions, and say "I don't know" without being judged. Creating psychological safety is essential for effective challenge and good governance – without it, boards risk groupthink, poor decisions, and missed opportunities to improve.

See also: C is for Challenge, G is for Groupthink, B is for Bravery

P is for Pupil Voice

This should go without saying but there are boards who never hear from the pupils and where governors never experience the school day and where pupils are reduced to data sets. It is good practice, if you can, to visit your school during the day but always follow the school governor visits procedure.

Ask - is pupil voice a regular item on your meeting agendas? Think about what you want to know more about and ask the pupils via the school council or pupil parliament.

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

P is for Pupil Premium

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

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

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

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

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

It is really important to remember that you will have pupils in receipt of PP and who are SEND or who are high attainers or EAL¹⁹. They deserve our very best efforts. If you are interested, the [Education Endowment Foundation](#) publish some helpful research.

Keep a watch out for any updates.

P is for Purpose

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

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

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

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

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

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

Q is for Questions

Curious Questions Matter. Not all questions are curious but all are about seeking clarification. A range of different types of questions can lead to deeper insights and more comprehensive discussions.

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

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

Minutes that show lots of questions have been asked but none of them were insightful, challenging or sought a deeper response could be an indicator of an ineffective board. If the only questions governors are asking are *what does an acronym mean?* or *what date is a school event?* then again this could be an indicator of a

¹⁹ English as Additional Language

lack of confidence, poor quality documentation or a misunderstanding of the strategic nature of effective governance.

Top Tip

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



Q is for Quiet

Not everyone is loud. Not everyone speaks up in meetings. And that's okay - but it's also the board's responsibility to make sure quiet voices are heard.

Some of the best governors and trustees are quiet. They listen carefully, think deeply, and when they do speak, what they say is worth hearing. But in a room full of confident, vocal people, quiet voices can get drowned out - and that's a loss for the whole board.

Why quiet matters

If your board only hears from the loudest voices, you're missing out on:

- Different perspectives and insights
- Thoughtful questions that might challenge assumptions
- The views of people who process information differently or need more time to think
- The contributions of people who are less confident but just as capable

A board that only listens to the loud is not an effective board. It's a board at risk of groupthink, poor decisions, and a culture where only certain types of people feel they belong.

Creating space for quiet voices

As a chair, or as a fellow governor, you can help make sure quiet voices are heard:

- Ask directly - *"We haven't heard from [name] yet - what are your thoughts?"* Don't pick on them and remember just because someone is not looking directly at you does not mean that they are not paying attention.

- Give thinking time - don't expect everyone to respond instantly. Pause. Wait. Let people gather their thoughts.
- Use different formats - not everyone is comfortable speaking in a large group. Consider smaller breakout discussions, written contributions, or one-to-one conversations before meetings.
- Don't interrupt - if someone quiet is speaking, let them finish. Don't talk over them or finish their sentences.
- Value listening - not contributing verbally doesn't mean not contributing. Someone who listens carefully and asks one thoughtful question is more valuable than someone who talks constantly but says nothing useful.

If you're the quiet one

If you're naturally quiet, you still have a responsibility to contribute. You don't have to be the loudest voice in the room, but you do need to find ways to make your voice heard. That might mean:

- Preparing questions in advance so you feel more confident raising them
- Speaking to the chair or another governor before the meeting if you have concerns
- Asking for thinking time if you need it
- Remembering that your perspective matters just as much as anyone else's

Belonging means everyone feels they have a place at the table.

See also: P is for Psychological Safety, B is for Belonging (if you have it), G is for Groupthink, N is NOT for Nobody

Q is for Quorate

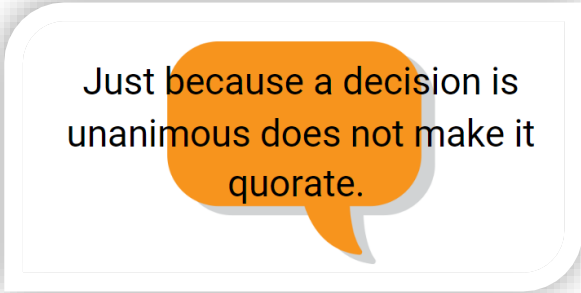
Meetings that are not quorate can still take place, but they cannot necessarily make decisions. It is good to be aware of what the quorum is for all your meetings are even as a new governor. If there are 15 people round the table at an FGB in a maintained school, 3 of whom are not governors and there are 2 governor vacancies – what is the quorum?²⁰ Your clerk will check the meeting is still quorate if someone leaves the meeting. They might only mention this out loud at the meeting if the meeting becomes inquorate but they should be confirming in the minutes the time someone left a meeting and the point at which the meeting became inquorate. Often minutes will state 'the meeting was quorate at all times.' If you know you have to leave a meeting early it is advisable to mention this at the beginning of the meeting. It is important.

Meetings should be quorate to ensure;

- Legitimacy – to minimise opportunity for challenge
- Representation - to avoid groupthink and cliques, ensures a range of views are heard,
- Accountability and transparency
- Demonstrates commitment
- Operational efficiency – to avoid delays

²⁰ <http://www.legislation.gov.uk/uksi/2013/1624/regulation/14/made>

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



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

The quorum of the meeting needs to be agreed in advance and most quorum are a minimum of 3 governors; (although in an academy trust the quorum for a committee meeting may be as low as 2 trustees). This will be set out in the terms of reference. If these three people are two school staff and the chair you may wish to question this – one may ask if they are *marking their own homework* so to speak.

If you govern in a Voluntary Aided or Catholic church school the quorum will relate specifically to the number of Foundation Governors present at the meeting and this will be set out in the Articles of Association, terms of reference, Standing Orders or Scheme of Delegation. The clerk should be able to advise.

R is for Records Management

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

See also: G is for GDPR, I is for Information Governance

R is for References

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

R is for Relationships

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

Remember;

- ✓ Healthy debate is a good thing
- ✓ Not all challenge is conflict
- ✓ Ensuring that everyone has an equal voice creates transparency
- ✓ Having a good chair is important
- ✓ Positive relationships support effective governance
- ✓ Being kind to each other costs nothing

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

See also: B is for Belonging, C is for Conflicts of Interest, P is for Psychological Safety

R is for Related Party Transactions

A Related Party Transaction (RPT) involves the transfer of resources, services or obligations between related parties.

RPTs are not automatically prohibited, but they must be properly managed, transparent and in the best interests of the school or trust.

For maintained schools, the SFVS requires adequate arrangements to manage RPTs and a complete list of RPTs to be appended to the SFVS. Where a governor, member of staff or close relative has an interest in an organisation involved in a transaction, that interest must be declared and appropriately managed. The person concerned should take no part in the relevant procurement process. Maintained schools do not generally require DfE approval for RPTs, although local authorities may impose additional controls.

For academy trusts, the Academy Trust Handbook sets out specific requirements for RPTs, including circumstances where prior approval is required and the application of the “at cost” rule.

The key message is simple: declare the interest, manage the conflict and follow the correct procurement and approval process.

When in doubt, ask your finance lead, clerk/governance professional or local authority/trust finance team for advice.

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

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

See also: C is for Conflicts of Interest G is for Gifts and Hospitality, P is for Pecuniary and Business Interests.

R is for Reliable

Being reliable in the context of governance has two meanings.

First, it means making sure that you do what you say you are going to do, that you undertake training, and are available (as much as possible) for those extra meetings that have a habit of popping up at a moment's notice.

Second, it means that we make sure the information presented to us in reports and meetings is accurate, proportionate, and reasonable, and that we can reasonably rely on it when we make decisions or take actions.

R is for Remuneration (an oft misspelt word!)

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

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

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

- Any pay (particularly for executive leaders like the CEO, CFO, or headteachers) must be defensible and proportionate; it should also follow the pay policy.
- Boards should be able to explain why the level of pay is appropriate compared with similar trusts/schools. Regular external benchmarking is important.
- Remuneration decisions must be openly recorded in board minutes and not just made by the Chair (another true story).
- Executive pay over £100,000 (or multiple high salaries) attracts public and DfE scrutiny. This includes pension contributions – this must be published on the website. The Academy Trust Handbook 2026 has additional reporting requirements for pay over £174,000.

- Trustees themselves normally receive no remuneration (only reasonable expenses) – this protects trust funds and public accountability.
- Decisions on executive pay should be made by a remuneration (or pay) committee or by trustees who are not conflicted. Individual governors and trustees should not be involved in making decisions about their own pay, or in setting individual teacher pay decisions (which are operational matters for the headteacher and pay committee).
- No individual can be involved in setting their own pay.
- Boards must follow the Academy Trust Handbook (section on "Executive pay and benefits") and charity law.
- The DfE expects trusts to be able to show evidence that remuneration represents value for money and supports the trust's educational objectives.

Top Tips

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

See also: P is for Pay, P is for Performance Management

R is for Research

It is increasingly important that governors ask research and evidence-based questions. The Education Endowment Foundation has published specific guidance on this - [here](#).

What's the difference between evidence-based and non-evidence-based questions?

Non-evidence-based questions are based on assumptions, anecdotes, or what "feels right":

- "Shouldn't we be setting more homework? I think pupils need more practice."
- "Why don't we just put pupils in ability groups? That's what we did when I was at school."

Evidence-based questions ask for data, research, or measurable impact:

- "What does the research say about the impact of homework on pupil outcomes in our context?"
- "What evidence do we have that our grouping strategy is improving outcomes for all pupils, particularly the disadvantaged?"

Why does this matter?

Evidence-based governance helps you:

- Make better decisions for pupils
- Challenge assumptions constructively
- Focus on what actually works, not what sounds good
- Hold leaders to account for impact, not just activity

How to ask better questions:

- Ask "What's the evidence?" rather than "What do you think?"
- Request data: "Can we see the outcomes for different groups?"
- Focus on impact: "How do we know this is working?"
- Reference research: "What does the EEF guidance say about this approach?"

Useful EEF resources:

- [EEF Guidance for School Governors](#)
- [EEF Teaching and Learning Toolkit](#) - summarises research on what works in education
- [EEF Guidance Reports](#) - practical, evidence-based recommendations on key topics

See also: C is for Challenge, D is for Data, Q is for Questions

R is for Resignation

Resigning as a governor or trustee is straightforward, but there is one important step: tell the clerk. Your resignation needs to be formally recorded, and the clerk is usually the person who needs to know first so they can update records, inform the chair, and begin the process of filling the vacancy.

The dates matter too. A governor's term, resignation date and any notice requirements can affect who is actually in post and when a vacancy arises. So don't simply stop attending meetings—make the resignation clear and make sure it has been received and recorded.

You can resign at any time during the academic year, but if you can, it's good to give the chair some notice so the board can plan for succession and recruitment.

True story: A clerk once turned up to a meeting to discover that half the board had resigned—and nobody had told them. The meeting was inquorate, decisions couldn't be made, and chaos ensued. Don't be that board. If you're resigning, tell the clerk. It's not just courteous—it's essential for the board to function. Thank you in advance

Teacher resignation dates

If you're a teacher governor or trustee, be aware of the statutory resignation dates for teachers, as set out in the School Teachers' Pay and Conditions Document (STPCD). These are:

- 31 October (for resignation effective 31 December)
- 28/29 February (for resignation effective 30 April)
- 31 May (for resignation effective 31 August)

These dates apply to teachers in maintained schools and academies that follow the STPCD. If you're a teacher governor and you're planning to leave your teaching post, make sure you're aware of these deadlines—and remember to tell the clerk about your governor resignation separately, as the two roles are distinct.

See also: S is for Succession Planning

R is for Resilience

Resilience in governance is not about being tough enough to withstand everything. It is about having the confidence, relationships and sense of purpose to keep going when things are difficult, uncertain or uncomfortable.

For a governor or trustee, resilience means staying connected to the reason we are here: to serve our children and communities and to help our organisation flourish. It means being willing to listen, to challenge, to change our minds, and sometimes to sit with difficult decisions without losing sight of the bigger picture.

We need to be resilient enough to challenge, and connected enough to care.

Because resilience is not just an individual quality. Boards are resilient when people feel they belong — when governors know they are valued, can speak honestly, disagree respectfully and ask for help. That sense of connection gives us the courage to have the difficult conversations and the trust to navigate setbacks together.

Resilience, then, is not about standing alone. It is about standing together: holding our purpose, our values and our relationships when things get tough. Resilience is about knowing when you need help and support both as an individual and as a board.

R is for RISE

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

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

RISE teams operate at 2 levels:

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

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

RISE teams will prioritise supporting stuck²¹ schools that are eligible for targeted intervention.

There is more information [here](#).

As a governor or trustee, you should be aware if your school is eligible for RISE support and what that means for your improvement journey. You should also know if school leaders are working as RISE advisers.

R is for Risk

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

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

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

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

R is for Risk Register

It is important that the risk register shared with governors and trustees does not

- Eat itself due to its size and complexity; honestly some risk registers are so complicated you can't see the wood for the trees
- Include so many operational risks that it becomes meaningless
- Has multiple layers making it illegible

²¹ defined as a school that was graded Requires Improvement or equivalent at its most recent Ofsted inspection, and was also graded below Good at its previous inspection and is still within the same structure

A good risk register should be strategic, focused on the biggest threats to achieving your objectives, and regularly reviewed and updated.

S is for Safeguarding

Safeguarding is everyone's responsibility - and as a governor or trustee, you have a crucial role in ensuring your school keeps children safe.

What is safeguarding?

Safeguarding means protecting children from maltreatment, preventing harm to their health or development, ensuring they grow up in safe and effective care, and taking action to enable all children to have the best outcomes.

Your safeguarding responsibilities as a governor

You must:

- Ensure the school complies with its safeguarding duties under Keeping Children Safe in Education (KCSIE) - see K is for KCSIE
- Make sure there is a designated safeguarding lead (DSL) and deputy DSL in place
- Ensure all staff receive appropriate safeguarding training
- Check that safer recruitment practices are followed
- Monitor that the single central record (SCR) is maintained and compliant
- Ensure the school has effective safeguarding policies in place
- Hold leaders to account for creating a culture of safeguarding

Most boards also appoint a **designated safeguarding governor** who takes a lead role in monitoring safeguarding on behalf of the board.

Get trained

As a new governor or trustee, complete safeguarding training as soon as possible after joining the board. If you're not asked to do it - ask for it. You must complete all safeguarding training when requested.

Your school or trust will provide links to training. You may also find these resources helpful:

- [Andrew Hall - Safeguarding in Schools](#) - free information for governors and regular newsletters
- Your local safeguarding partnership may also offer governor training

Safeguarding in practice

Safeguarding must run through every action and every decision you take as a governor or trustee. It's not a separate agenda item - it's a lens through which you view everything the school does, including:

- Curriculum decisions (does it teach pupils how to keep themselves safe?)
- Behaviour policies (are they trauma-informed and supportive?)
- Attendance monitoring (are patterns of absence investigated?)
- Staff appointments (are safer recruitment procedures followed?)
- Premises and security (see V is for Visits)

Some trusts have a trust-wide safeguarding lead who takes a strategic view of safeguarding across the trust. Make sure you know who this is and how safeguarding is coordinated across your organisation.

Red flags to watch for:

- Safeguarding not appearing regularly on board agendas
- No designated safeguarding governor in place
- Governors not receiving regular safeguarding updates

- SCR not being checked regularly
- Staff and governor/trustee safeguarding training not up to date

Questions to ask

1. How many safeguarding concerns have been raised this term/year?
2. What are the themes and patterns?
3. How quickly are concerns responded to?
4. Are all staff up to date with safeguarding training?
5. When was the SCR last checked and were there any issues?
6. How do we know our safeguarding culture is strong?

See also: K is for KCSIE, T is for Training, V is for Visits

S is for Scheme of Delegation (academy trusts)

A Scheme of Delegation (SoD) is a document that sets out who is responsible for making which decisions within an academy trust. It clarifies what decisions are made by the Trust Board, central team, local governance layer and individual academies, and what authority is delegated between them. Its purpose is to ensure that decision-making is clear, accountable and proportionate, while allowing decisions to be made at the most appropriate level. The SoD should be published on the Trust's website, reviewed by the Trustees regularly, and checked that it is doing what it supposed to be doing. SoD should not be a list of every activity and should not be used to performance manage headteachers (another true story).

The SoD is separate from the financial scheme of delegation which should be in place in both trusts and maintained schools. The financial scheme sets out the levels of financial delegation and the thresholds above which governor or trustee approval is required. The most important thing to remember is to ensure that the delegation levels are set at a reasonable level – too low and headteachers cannot operate effectively; too high and there is a risk of a loss of financial oversight. The financial scheme of delegation must be approved every year even if it does not change.

Remember the Scheme of Delegation is a living document and not something to be taken off the shelf after an incident has happened.

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

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

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

S is for School Council

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

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

See also: P is for Pupil Voice.

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

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

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

Top Tip

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

S is for SOAP

SOAP stands for **Strengths, Opportunities, Aspirations, and Progress** – a framework sometimes used in governance discussions to structure strategic conversations and link governor visits to school improvement priorities. It's a simple tool to help governors move beyond "what I saw" to "what it means and what happens next."

SOAP also stands for School on a Page – which is a high level summary of key information and very useful as an aide memoire when you are talking with Ofsted. If you are new to governance why not ask if your board is given a SOAP.

S is for Scrutiny

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

Some questions that might help with scrutiny are;

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

Areas that are regularly scrutinised by governors or trustees include

- Reviewing attendance, behaviour and performance data
- Budgets and funding
- Audit and compliance
- Pupil outcomes

S is for Self-Reflection

This is another of the larger new entries in the Glossary this year. Taking some time to reflect both on our impact as governors and trustees and on our own development needs is really important. This is because effective governance isn't just about what the board does collectively – it's also about how individual governors and trustees reflect on their own contribution, development and sense of belonging within the board.

Self-reflection is the practice of regularly thinking about your own performance, impact, skills and wellbeing as a governor or trustee. Self-reflection helps you stay engaged, effective and connected. It helps you:

- Identify areas where you can develop and contribute more effectively
- Recognise when you might need support or training
- Understand how you're contributing to the board's work
- Check that you feel valued and that you belong

- Ensure governance remains meaningful and rewarding for you

Why self-reflection matters

Governance can be demanding; especially if you are a new governor or trustee. It's easy to:

- Feel overwhelmed or unclear about your role
- Miss opportunities to develop your skills
- Not recognise when you need support
- Feel disconnected from the board's work

Questions to ask yourself regularly

About your contribution:

- Am I attending meetings regularly and preparing adequately?
- Do I ask questions that help the board make better decisions?
- Am I contributing my skills and experience effectively?
- Do I understand the issues we're discussing?
- Am I fulfilling my link governor/trustee responsibilities (if applicable)?

About your development:

- What training have I completed this year?
- What areas do I feel less confident about?
- What would help me be more effective?
- Am I keeping up to date with education policy and practice?

About belonging:

- Do I feel my contributions are valued?
- Do I feel comfortable asking questions or challenging?
- Do I understand how my role fits into the bigger picture?
- Do I feel connected to the board's vision and values?
- Am I building positive relationships with other board members?

About wellbeing:

- Is governance taking up more time than I can reasonably give?
- Am I enjoying the role?
- Do I feel supported by the chair and other board members?
- Is the balance between governance and my other commitments sustainable?

When to reflect

- Build self-reflection into your governance routine:
- After each meeting – A quick mental check: Did I contribute? Did I understand? What could I do differently next time?
- Termly – Review your development needs and link responsibilities
- Annually – A deeper reflection on your overall contribution and whether you want to continue in the role
- Before reappointment – Honest consideration of whether you can commit for another term

Top Tips

- Keep a simple governance journal or notes about your learning and questions
- Don't be too hard on yourself – everyone has areas to develop
- Share your reflections with the chair if you need support
- Remember that asking questions and admitting what you don't know is a strength, not a weakness
- Use the skills audit process as a prompt for self-reflection
- If you're not feeling that you belong, talk to someone – the chair, another governor, or your clerk

Self-reflection and board effectiveness

When individual governors and trustees reflect on their practice, the whole board benefits. A culture of reflective practice:

- Encourages continuous improvement
- Makes it easier to have honest conversations about board effectiveness
- Helps identify training needs
- Supports succession planning
- Creates a more inclusive and supportive board culture

See also: S is for Skills and Knowledge Audits, S is for Succession Planning, T is for Training

S is for Single Central Record

Governors need to take responsibility for ensuring that the SCR is up to date (this is usually the safeguarding governor) but they do not need to see the details. Governors and trustees should clarify that the safeguarding governor is verifying that *audits and checks are occurring*, spot-checking processes alongside senior leadership without managing the register personally.

There are useful checklists published on the internet. The SCR is as important as the attendance register. This link on [FAQ](#) is helpful

Ofsted always checks the SCR during an inspection.

Amanda Speilman, the former Chief HMI, told governors in June 2019²² which is worth bearing in mind as it is still relevant;

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

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

S is for Skills and Knowledge Audits

Skills audits should be undertaken regularly and as a new governor or trustee you may have been asked to fill an audit form in before you joined the board. It is also a good idea to 'test' the board's knowledge regularly as well. There are several models and templates and your school may follow the National Governance Association model or it may follow one which it has designed itself.

Other models are available from the Chartered Governance Institute who offer a model for academy trusts [here](#).

S is for Social Media

Lots of schools use social media. If you use social media²³ make sure you have read the school's social media policy, that you follow the requirements of the code of conduct and you respect the confidentiality of the board meetings. If someone has a complaint about the school, always refer them to the school's complaints policy and try not to get involved.

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

²² Speech to the NGA Summer Conference 2023

²³ [Cyber security in schools and trusts | National Governance Association \(nga.org.uk\)](#) – requires a log in

Top Tips

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

S is for Special Schools

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

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

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

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

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

S is for Spelling Mistakes

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

S is for Staffing

Staffing and employment advice for schools dated September 2024 remains extant. The guidance reminds governing bodies, including academy trusts that they should ensure that they have access to appropriate professional advice and support from reliable and accredited individuals or organisations, including legal advice where necessary. Even if you know a lot about HR processes it is always wise to seek external advice; in fact, is it wise to do so.

S is for Stakeholder

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

Internal stakeholders

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

External stakeholders

• Charitable and voluntary organisations • Department for Education (DfE) • Diocese/parish council • Education & Skills Funding Agency (ESFA) • Employers and local businesses • Higher/further education institutions • Local authorities	• Local communities • Ofsted • Other schools and trusts • Parents and carers • Suppliers and service providers
--	--

Can you think of any other groups?

Top Tip

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

- High interest / High influence → manage closely
 - High interest / Low influence → keep informed
 - Low interest / High influence → keep satisfied
 - Low interest / Low influence → monitor
1. What does the grid look like?
 2. Is it balanced?

S is for Standing Items and Orders

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

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

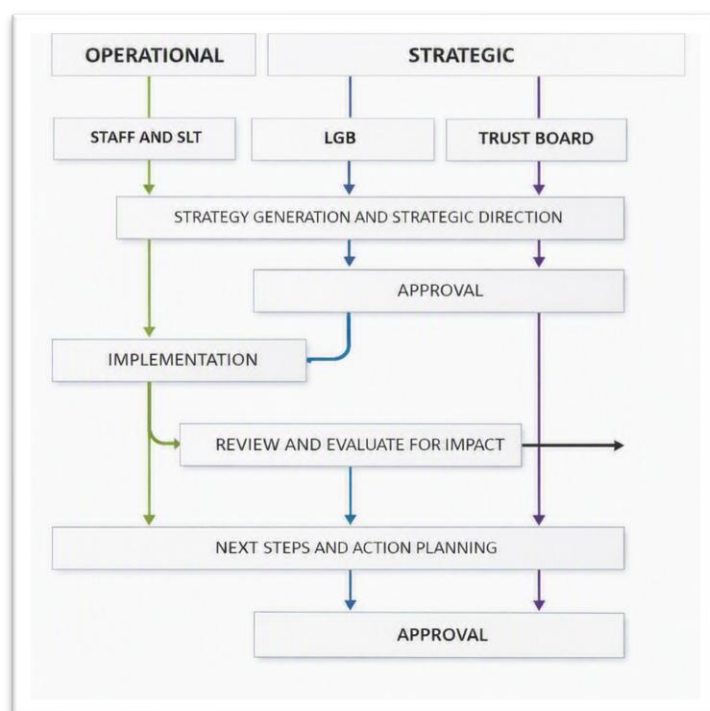
S is for Strategic

Boards should know the difference between strategic and operational decisions although sometimes there is a balance to make. Below is a suggested model for the strategic/operational divide in an academy trust. It is based on a model first mooted by the National Governance Association.

This model below illustrates the cyclical relationship between operational and strategic governance within a trust structure.

- Operational level (Staff and SLT) focuses on implementing agreed strategies and evaluating their impact.
- Strategic level (LGB and Trust Board) leads on generating strategic direction, approving plans, and ensuring alignment with trust vision and values.
- The process flows from strategy generation → approval → implementation → review and evaluation → next steps and action planning → re-approval, creating a continuous improvement loop.
- Colour-coded pathways highlight the distinct but interconnected roles of each governance tier, ensuring accountability and coherence across all levels

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



Think: if you're discussing something, ask: Does this affect the whole school/trust? Does it relate to our long-term goals? If yes, it's strategic. If it's about day-to-day operations, it's operational.

S is for Subsidiarity

Subsidiarity is a way of organising decision-making so that decisions are made as close as possible to the people they affect, unless there is a good reason for making the decision at a higher level.

In simple terms: “The centre should only do what the local level cannot do effectively itself.”

How this works in an academy trust

In a Multi-Academy Trust (MAT), you have different levels of responsibility:

Trust Board → Trust executive/central team → Individual academy → Staff/classrooms

Subsidiarity means you don't automatically push every decision up to the Trust Board or central team.

For example:

Decision	Likely level
Trust strategy	Trust Board
Trust-wide financial controls	Trust / central team
Safeguarding standards and policies	Trust sets the framework
How a particular school implements those standards	Academy
Agreeing improvement priority within an individual academy	Local Governance
Day-to-day teaching decisions	Teachers/school leaders
Responding to a particular pupil's needs	School/local level

The key is that the Trust provides the things that genuinely benefit from being done centrally, while allowing individual academies enough autonomy to respond to their own circumstances.

An example

Imagine a Trust has 10 schools.

It might decide centrally that all schools must have strong safeguarding arrangements, because safeguarding is a Trust-wide responsibility. But it wouldn't necessarily tell every school exactly how the headteacher should organise every aspect of safeguarding each day.

The Trust might set:

- The minimum standards
- The policies and expectations
- The reporting arrangements
- How the trust monitors safeguarding

The individual academy can then decide how best to implement those expectations given its pupils, staff and local circumstances.

Why use subsidiarity?

It is basically an attempt to get the balance between central control and local autonomy right.

Too much centralisation: the Trust decides everything. That can make schools and governors feel powerless and can lead to decisions being made by people who don't know the local context. It can also lead to misunderstandings.

Too little centralisation: every school does whatever it wants. That can create inconsistency, duplication and potentially unacceptable differences in standards.

See also: S is for Scheme of Delegation

S is for Succession Planning

It is really important that you think about the future. What will happen if the chair suddenly resigns or leaves the board for any reason? Or the governor with a responsibility for safeguarding or the governor who knows everything about pupil premium or SEND (hint - everyone on the board should know something)? We should all begin, if we have not done so already, to establish and maintain 'a culture of succession' and have in the words of the NGA *ongoing, honest discussions about succession planning*²⁴ where governors/trustees feel comfortable about discussing their intentions.

Chairs should model practice so that aspiring chairs feel that the role is manageable. No one person can do the work of the board after all. Equally chairs should not be chairs forever but changing the chair every year or two can be disruptive.

Top Tips

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

²⁴<https://www.nga.org.uk/News/NGA-News/Jan-2018-Mar-2018/Preparing-your-Board-for-the-future---new-guidance.aspx>

T is for Training and CPD

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

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

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

Top Tips

- Always do the training asked of you in a timely manner
- Don't overwhelm yourself by trying to do all the training you can find
- Always seek approval before you book training if you are not paying for it yourself

T is for Trust

Trust has two meanings in education, and both matter.

Trust as a legal entity

A multi-academy trust (MAT) is a single legal entity that runs multiple schools; as is a Single Academy Trust. The trust board is the responsible body for all schools within the trust, with legal and strategic accountability for their performance. Local governing bodies (LGBs) operate with delegated authority – they have the powers the trust board chooses to give them, which can vary enormously between trusts.

Understanding this distinction matters because it clarifies where accountability sits and how decisions get made. See also A is for Academy Trust.

Trust as a behaviour

But trust is also something you build – or break – through your actions as a leader or governor/trustee.

Leaders and governors should develop constructive relationships with all parents and with the wider community, to build trust. You can't mandate trust; you earn it by:

- Being honest – especially when things go wrong
- Following through – doing what you said you'd do
- Being vulnerable – admitting when you don't know something (see L is for Listening)
- Making space for others – creating psychological safety where people can challenge and contribute
- Acting with integrity – even when it's uncomfortable

Without trust, you get dysfunction (see D is for Dysfunctionality). Lencioni identifies absence of trust as the foundation dysfunction – when board members are unwilling to be vulnerable with one another, everything else falls apart.

The connection

Interestingly, the two meanings of trust are connected. Governors and trustees must "ensure that the school's vision, ethos and strategic direction are clearly defined" How Ofsted inspects leadership and governance and work in partnership with leaders. Whether you're a MAT trustee, an LGB member, or a

maintained school governor, your effectiveness depends on building trust (the behaviour) within your trust (or school).

See also: D is for Dysfunctionality, L is for Listening, P is for Psychological Safety

T is for Trustee

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

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

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

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

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

T is for Types of Governor

The main types of governors are;

- Co-opted governors are appointed by the board for their skills (sometimes called community governors)
- Staff governors are elected²⁵ by the staff (1 in a maintained school – check the AoA in an academy)
- Parent governors are elected by the parent body (2 in a maintained school – check the AoA in an academy). If you are a parent governor you are a representative of the parent body not a representative for the parent body; do not go rushing into the playground trying to gather views or report what was said at the meeting. This is sometimes hard so if you find yourself in a tricky situation, step back politely and direct the person to the school’s complaints policy
- Foundation governors are appointed by the church if you are in a church school but can also be appointed by the founding body of the school. If you are in a Voluntary Aided²⁶ (VA) Church of England school, for example, governors have some additional responsibilities. It is important that you understand these responsibilities
- The LA governor is recommended by the board to the LA and the board has an element of choice over whether to appoint or not. The vast majority of trusts do not have LA governors
- Only the Headteacher can be the headteacher governor but sometimes this can be the executive headteacher. It cannot be the staff governor and the role cannot be passed to anyone else.
- Associate members are not governors and cannot vote unless the board specifically agrees. Not all boards have associates

²⁵ Top tips on running parent and staff elections. [SBW Governance - Free Downloads](#)

²⁶ Voluntary-aided schools are maintained schools and often, but not always, have a religious character. This is a very useful guide to the difference between VC and VA schools <http://www.rdbe.org.uk/schools/information-for-schools-3/information-for-schools-2/voluntary-aided-voluntary-controlled-schools/frequently-asked-questions-2>

- other persons may (may not will) be invited to attend at the request of the board²⁷

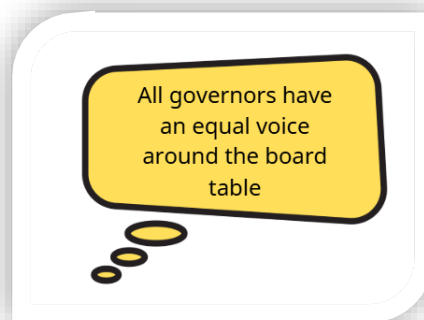
Each type of governor has a term of office. This is usually 4 years but can be less. It cannot be more without either being re-elected or re-appointed. This should always be minuted. Your clerk will lead you through all election and appointment processes.

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

Top Tip

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

Let us hope you do not!



T is for Type of School

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

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

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

U is for Urgent

Your urgent is not my urgent. Well sometimes it is!

This is one of the most important things to remember in governance. What feels urgent to the headteacher or CEO may not be urgent to the board. What feels urgent to you as a governor may not be urgent to anyone else. And just because something is urgent doesn't mean it's important.

The problem with "urgent" is that if everything is urgent, nothing is urgent. Governors and trustees need to distinguish between:

²⁷ [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013 - part 4](#)

- Genuinely urgent — needs immediate action (e.g., a safeguarding concern, a health and safety risk)
- Important but not urgent — needs attention but can wait for proper consideration (e.g., reviewing a policy, planning ahead)
- Urgent to someone else but not to the board — operational matters that leaders should handle
- Not urgent and not important — things that can wait or don't need board involvement

Why this matters

- Workload and wellbeing: Constantly responding to "urgent" requests creates unsustainable workload and stress. This leads to burnout and good governors leaving.
- Poor governance: When everything is treated as urgent, there's no time for proper scrutiny or strategic thinking. Decisions get rushed and risks get missed.
- Blurred boundaries: If the board is constantly dealing with urgent operational matters, it's not doing its job of strategic oversight.

Questions to ask when something is labelled "urgent"

1. What happens if we don't deal with this immediately?
2. Is this a governance matter or an operational matter?
3. Can this wait until the next scheduled meeting?
4. Is there a statutory deadline?
5. What's driving the urgency — genuine crisis or poor planning?

Timing, proportionality and prioritisation

- Respect people's time: Don't send "urgent" emails late at night or at weekends unless it's a genuine emergency. Governors are volunteers with lives outside governance.
- Give proper notice: If you need a decision, give governors time to read papers and think things through. Springing things on people at the last minute is poor governance.
- Be proportionate: The response should match the issue. A typo in a policy doesn't need an emergency meeting. A safeguarding crisis does.
- Not everything can be a priority. Use the board's strategic priorities to decide what needs urgent attention and what can wait.

Top Tips

- Agree what "urgent" means as a board
- Use the Chair's Power to Act sparingly — most things can wait
- Plan ahead to reduce genuine emergencies; use your agenda planner
- Push back respectfully if something doesn't feel genuinely urgent
- Protect your wellbeing — you don't have to respond to every email immediately

Remember good governance is strategic, planned, and sustainable — not reactive, chaotic, and exhausting.

See also: C is for Chair's Power to Act, S is for Strategic, W is for Workload, W is for Wellbeing

U is for Not for Underestimate

If you're a new governor or trustee reading this Glossary (and well done for getting this far – it's not a short document), firstly, thank you for joining one of the biggest groups of volunteers in the country. Secondly? A word of warning.

Do not underestimate the amount of time being a governor or trustee can sometimes take.

If you see an advert that says something like "*We need an HR trustee – just 6 meetings a year*" – I'm sorry, but that's not the whole story!

Yes, there may be 6 meetings a year. But that doesn't include:

- Time to prepare for meetings – reading papers, thinking about questions, understanding the context
- Committee meetings – finance, standards, pay, safeguarding, and so on
- Link governor visits – spending time in school, talking to staff and pupils, writing reports
- Extraordinary meetings – when something urgent comes up
- HR panels and meetings – these can take up a lot of time
- Training and development – keeping your knowledge and skills up to date
- Thinking time – governance isn't just about turning up; it's about reflecting, questioning, and staying engaged

The reality is that effective governance takes time. How much time depends on your role, your school or trust, and what's happening at any given moment. Some weeks it's a couple of hours. Some weeks it's more. And if you're the chair, vice chair, or a link governor with a demanding portfolio (like safeguarding or SEND), it can be significantly more.

But please don't be put off.

Being a governor or trustee is interesting, important, and rewarding. You'll learn new skills, meet inspiring people, and make a real difference to the lives of children and young people. You'll be part of something bigger than yourself, and you'll contribute to your community in a way that genuinely matters. Just go into it with your eyes open. Understand what you're signing up for, be honest with yourself about the time you can realistically give, and don't be afraid to ask for support if you need it.

Governance is a team effort. You're not expected to do it alone.

See also: C is for Capacity, W is for Workload, W is for Wellbeing, S is for Succession Planning

U is for Understanding

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

U is not for Unilateral

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

Unilateral decision making is not good governance.

U is for Unusual

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

See also: O is for Outlier

U is for Update

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

V is for Vice Chair

This is also new entry into the Glossary as not including it was a considerable oversight on the part of this chair.

The vice chair plays a crucial supporting role in effective governance. While the chair leads the board, the vice chair acts as deputy, stepping in when the chair is unavailable and providing a sounding board for the chair between meetings.

Key responsibilities of the vice chair:

- Standing in for the chair when they are absent from meetings or unable to fulfil their duties
- Supporting the chair by sharing the workload and acting as a trusted colleague
- Providing continuity and ensuring governance continues smoothly if the chair steps down
- Chairing specific meetings or committees if delegated by the board
- Acting as a 'critical friend' to the chair, offering honest feedback and challenge
- Supporting succession planning by developing the skills and experience needed to potentially become chair

What the vice chair is not:

- A deputy headteacher equivalent – the vice chair doesn't have executive authority
- Automatically the next chair – succession should be planned, not assumed
- Responsible for doing the chair's job when the chair is available
- A more senior governor than others on the board (except when acting as chair)

Making the vice chair role effective:

The relationship between the chair and vice chair should be built on trust, open communication, and shared commitment to the board's success. The chair should:

- Keep the vice chair informed about key issues and developments
- Involve the vice chair in planning and preparation
- Delegate specific responsibilities where appropriate
- Support the vice chair's development and learning

The vice chair should:

- Be proactive in offering support to the chair
- Maintain confidentiality and discretion
- Be prepared to step into the chair's role at short notice
- Continue to develop their governance skills and knowledge

Succession planning

Being vice chair is often (though not always) a stepping stone to becoming chair. It provides valuable experience in leading meetings, managing board dynamics, and working closely with the headteacher or CEO. However, boards should avoid assuming the vice chair will automatically become the next chair – succession should be planned and discussed openly.

Top Tip

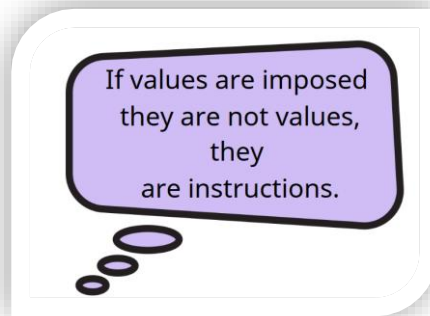
If you're a new governor or trustee, don't assume the vice chair role is out of reach. Some boards actively encourage newer governors to take on the vice chair role to develop their skills and bring fresh perspectives to board leadership. There are instances of clerks being appointed as co-opted governors and then being elected as vice chair all in the space of 5 minutes. Rare but true!

See also: C is for Chair, S is for Succession Planning

V is for Vision and Value(s)

Vision describes the future an organisation seeks to create; values describe the principles and beliefs that guide how it behaves and makes decisions on the way there.

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



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

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

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

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

In short ***Vision is where we want to go; values are the compass; strategy is the route we take.***

What do you think?

Top Tips

- Ask whether the vision is actually driving decisions. If governors/trustees cannot see a clear connection between the vision and the priorities in the strategy, improvement plans and budget, the vision may be more words than direction.
- Test whether the values are lived, not just displayed. Ask: “What would we see, hear or experience in this school if we really lived these values?” Look for evidence in behaviour, relationships, recruitment, curriculum, resource allocation and difficult decisions.
- Use values when making the difficult choices. Values matter most when there are competing options. Ask: “Which option best reflects who we are and what we stand for?” If values never influence a difficult decision, they probably aren't functioning as values.

Remember - vision gives governance its destination; values provide its principles; strategy provides its choices.

V is for Visits (and Visitor Procedures)

Why visitor procedures matter

Schools must know who is on site at all times. Robust visitor procedures are a fundamental safeguarding requirement, not bureaucratic red tape. As a governor, you're modelling good safeguarding practice by following these procedures every time you visit.

Signing in

You must sign in every time you visit school - no exceptions, even if you're a regular visitor or a staff governor. This ensures:

- The school knows who is on site in case of emergency
- There's a record of your visit
- You're following the same safeguarding procedures you expect of everyone else

ID badges

You may be given a photo ID badge. You must wear this, or a visitor's badge, every time you visit school. Some badges include:

- Your photo
- Your name and role
- Your DBS number

Be thoughtful about what's on your badge: If you're a link governor for a specific area (e.g., disadvantaged pupils, SEND, safeguarding), consider whether you want this printed on your badge where pupils can see it. Discuss this with the school.

Making appointments

Always make an appointment before visiting school, unless you've been specifically invited. As a governor or trustee, you should not have door access codes or be able to enter school premises unannounced. This is both:

- A safeguarding measure (the school must control who enters the building)
- Professional courtesy (staff need to prepare for your visit and ensure it's productive)

When arranging a visit:

- Be clear about the purpose (monitoring visit, learning walk, meeting with a subject leader?)

- Agree the focus in advance (linked to the school improvement plan or your link governor role)
- Send any questions ahead of time so staff can prepare
- Confirm timings and who you'll be meeting
- Follow up with a written report to share with the board

See also: K is for KCSIE, S is for Safeguarding,

V is for Volunteer

As a governor or trustee, you are a volunteer giving your time, skills and commitment to improve outcomes for children and young people. This matters enormously – governance could not function without the dedication of volunteers across England.

From September 2026, there are important changes to safeguarding requirements for volunteers in schools. You can find a summary here [KCSIE 2026: how it affects parent volunteers in schools](#). The changes relate to any volunteer frequently teaching, training, instructing, or supervising children is legally in regulated activity, requiring an enhanced DBS check with children's barred list information. This applies regardless of whether the volunteer is supervised by a person in regulated activity – the previous "supervision exemption" has been removed.

Schools must ensure that all volunteers working with children have appropriate safeguarding checks in place. As a governor, you should be aware of these requirements, particularly if you volunteer in school yourself or if you have oversight of safeguarding procedures.

Remember: being a volunteer doesn't mean being unprepared or unsupported. You should receive proper induction, training, and ongoing support to carry out your governance role effectively. Your time is valuable, and the school or trust should respect and make good use of it.

See also: S is for Safeguarding, S is for Single Central Record

W is for Website

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

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

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

W is for "We" not "I"

One of the most important principles of governance is collective responsibility. Decisions are made by the board as a whole, not by individual governors or trustees acting alone.

This means:

- We decide together – even if you disagreed during the discussion, once a decision is made, it becomes the board's decision
- We speak with one voice – outside the boardroom, governors should not publicly disagree with board decisions
- We share accountability – if something goes wrong, the board is collectively responsible
- We support each other – governance is a team effort, not a collection of individuals

Why "we" matters

- You are part of a team working towards shared goals
- No single governor has more authority than another (except where specific roles like such as the chair require it)
- The board functions as a cohesive unit

Collective responsibility in practice

In the meeting:

- Robust discussion and challenge is encouraged
- Different views should be heard and considered
- Decisions are made democratically (usually by consensus or vote)
- Dissent is recorded if requested, but the decision stands

Outside the meeting:

- You support the board's decision even if you personally disagreed (this is not always easy)
- You don't undermine board decisions in conversations with parents, staff, or the community
- You refer people to official board communications, not your personal opinion
- You protect the confidentiality of board discussions

What if you fundamentally disagree?

If you cannot support a board decision because it conflicts with your values or you believe it's unlawful or unethical:

- Raise your concerns clearly in the meeting
- Ask for your dissent to be recorded in the minutes
- Seek advice from your clerk, governance professional, LA, or Trust team
- Consider whether you can continue in your role if the issue is serious enough

But remember, disagreeing with a decision you think is unwise is different from opposing something you believe is wrong.

Top Tips

- Model collective responsibility, especially if you're the chair or vice chair
- Build trust so that robust challenge in the meeting doesn't damage relationships outside it
- Remember that "we" includes everyone – new governors, experienced governors, and those who disagreed with the decision

See also: C is for Collective Responsibility, C is for Confidentiality, D is for Decision Making, T is for Types of Governor

W is for Wellbeing and Mental Health

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

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

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

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

W is for Whataboutery

This is the art of responding to one concern with, “Yes, but what about...?” rather than addressing the concern itself. It’s rarely a good look for governors or trustees—especially when it becomes a way of deflecting challenge, protecting power, or avoiding accountability. Good governance needs curiosity, not a game of *Who Gets the Last Word?*

Spare a thought for your poor clerk having to curate the minutes!

W is for Whistleblowing

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

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

W is for Workload

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

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

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

X is for No eXcuses

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

Y is for You

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

Z is for Zero

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

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

- Your local authority governor service team if there is one
- A former national leader of governance - information can be found at [IGovS](#)

- Your chair of governors, trust chair, clerk or governance manager, LA or Trust team

Remember: think **zero blind spots, not zero questions!**

Not only but also ...

Below is a list of the words and phrases that didn't make it into the Glossary in time for the major edit but are important if we are to be effective...

A is for Allergy

From September 2026, schools in England have new statutory duties around allergy safety: they must have an allergy safety policy, review it at least annually, publish it on their website and have regard to the [new DfE statutory guidance on allergy safety in schools](#). Schools should also identify pupils who need an Individual Healthcare Plan, put appropriate staff training in place, and record and learn from serious incidents and near misses. Governors and trustees should therefore have assurance that allergy arrangements are not simply a medical issue sitting with individual staff, but are embedded in policy, training, catering and safeguarding arrangements.

Some of you will have heard of Benedicts Law which is a set of national protections designed to improve allergy safety in schools. You can find more information here – [Benedict Blythe Foundation](#)

Questions governors and trustees should ask

1. How do we know our allergy safety policy, training, Individual Healthcare Plans and emergency arrangements meet the new statutory requirements from September 2026?
2. How do we assure ourselves that allergy risks are properly managed across the whole school day, including catering, trips, clubs and activities?

F is for Flourish

To flourish means to thrive, grow, and reach your full potential. In a school context, flourishing is about creating the conditions where every child – and every adult – can be happy, healthy, confident, and successful.

Flourishing goes beyond **belonging** (feeling safe, accepted, and valued). It's about what happens when belonging is in place: children are engaged, curious, resilient, and making progress. Staff feel supported, energised, and able to do their best work. The whole school community is thriving, not just surviving.

What does a flourishing school look like?

In a flourishing school:

- Pupils are happy, engaged, and making good progress academically, socially, and emotionally
- Staff feel valued, supported, and able to grow professionally
- Relationships are strong, respectful, and built on trust
- Wellbeing is a priority for everyone – not an afterthought
- The culture is positive, inclusive, and focused on growth (not just compliance or performance)
- Everyone – pupils, staff, families, governors – feels they can contribute and be heard

Flourishing is about more than results or Ofsted grades. It's about creating a school where people want to be, where they feel they matter, and where they can be their best selves.

Why flourishing matters for governance

As a governor or trustee, your role is to create the conditions for flourishing – not just for pupils, but for staff and leaders too. This means:

- Prioritising wellbeing alongside outcomes
- Challenging when the culture feels toxic, overly pressured, or focused only on performance

- Asking whether staff and pupils are thriving, not just coping
- Supporting leaders to create a positive, sustainable culture
- Modelling a healthy, flourishing approach to governance (not micromanaging, not adding unnecessary workload, not creating a blame culture)

The link between belonging and flourishing

Put simply belonging is the foundation; flourishing is the goal.

- If pupils don't feel they belong (safe, accepted, valued), they can't flourish (thrive, grow, reach their potential)
- If staff don't feel they belong (respected, supported, part of the team), they can't flourish (do their best work, grow professionally, stay energised)

Belonging is necessary but not sufficient. A child might feel they belong (they're not excluded, they have friends, they feel safe) but still not be flourishing (they're disengaged, anxious, or not making progress). A teacher might feel they belong (they're part of the team, they're valued) but still not be flourishing (they're burnt out, overwhelmed, or stuck in a rut).

Governors should ask: How to support flourishing...

- Ask about wellbeing – for pupils, staff, and leaders. Don't just focus on results, Are people just getting by, or are they thriving?
- Challenge workload – if staff are exhausted, they can't flourish
- Prioritise relationships – strong, respectful relationships are the foundation of flourishing
- Support professional development – help staff grow and develop
- Create a positive culture – one that values effort, growth, and kindness, not just outcomes
- Model healthy governance – don't add unnecessary pressure or workload. Be supportive, not punitive

Questions to ask

1. Are our pupils happy, engaged, and thriving – or just getting by?
2. How do we know whether staff are flourishing or just surviving?
3. What are we doing to support wellbeing for pupils, staff, and leaders?
4. Is our culture one where people feel they can grow, take risks, and be their best selves?
5. Are we prioritising flourishing, or are we only focused on performance and results?
6. How does our governance style support (or hinder) a flourishing culture?

Top Tips

- Flourishing isn't fluffy. It's strategic. Schools where people flourish have better outcomes, lower staff turnover, and stronger communities. If you want sustainable school improvement, start with flourishing.

See also: B is for Belonging, C is for Culture, I is for Inclusion, H is for Happy, J is for Joy, P is for Psychological Safety, W is for Wellbeing

F is for Food Standards

The [School Food Standards](#) remain mandatory for maintained schools and academies in England, covering the food and drink provided across the school day. The DfE's [guidance for governors](#), updated in July 2026, makes clear that governing boards have an important role in ensuring school food supports pupils' health, is financially sustainable and meets the required standards. This is particularly timely because the government consulted in 2026 on updating the legislative framework, with the response expected in September 2026, so governors and trustees should keep the position under review rather than assume today's standards will remain unchanged.

Questions governors and trustees should ask:

1. How do we assure ourselves that the food provided meets the current School Food Standards and caters safely for medical, dietary, cultural and religious needs?
2. Do we know what our catering provision costs, how it performs, and whether pupils and families are getting healthy, nutritious and good-value food?

And Finally... Why This All Matters

If you've made it this far through the Glossary, you deserve more than just virtual cake – you deserve a genuine thank you. Governance isn't easy. It's complex, demanding, and sometimes feels overwhelming. You're juggling acronyms, statutory duties, data dashboards, difficult questions, late papers, long meetings and the constant need to stay strategic rather than drift into the weeds. But here's the thing: it matters.

Every question you ask, every meeting you attend, every policy you scrutinise, every visit you make, every challenge you offer and every decision you take matters because, at the heart of everything we do as governors and trustees, are the children and young people in our schools. They are the reason we're here. Not the data. Not the compliance. Not the Ofsted grade. The children.

When we ask, "*How do we know this is working?*", we are asking on behalf of pupils who deserve the best possible education. When we challenge a decision, we do it to protect and improve outcomes for young people who are relying on us to get it right. When we approve a budget, we are making choices about resources that will shape their learning, their opportunities and their futures. And when we hold leaders to account, we are helping to ensure that every child — regardless of their background, their needs or their starting point — has access to an excellent education that prepares them for life.

That is why *So what?* may be one of the most important questions in governance. It takes us beyond policies, structures, committees, reports, registers and processes and asks what they are actually achieving. What difference does this make? Who is better served? What has changed? What have we learned? What would happen if we did nothing?

It is not a question designed to dismiss the importance of good governance. Quite the opposite. It reminds us that governance is a means to an end, not an end in itself. The purpose of the *Great Big Governance Glossary* is to make the language, ideas and practice of governance easier to understand, question and use — not simply to give us more words to add to the ever growing pile of acronyms (aka the Fog - *a dense accumulation of abbreviated terms which can obscure rather than clarify meaning, sometimes creating the comforting illusion that something complicated must therefore be important!*)

Governance is an act of service. It is not about power, status or being in charge. It is about stewardship — looking after something precious on behalf of others. It is about asking the difficult questions, making the tough decisions and always, always keeping the focus on what is best for children.

You are not alone. Across England, there are over 200,000 governors and trustees giving their time, skills and commitment to make a difference. You are part of something much bigger than your own board: a national network of volunteers who believe that every child deserves a great education.

So be curious. Be brave. Be kind. Be strategic. Be reflective. Be connected. Ask questions. Challenge when something doesn't feel right. Keep your eyes on the big picture. Lean on each other. And most importantly, remember that you belong here. You were appointed or elected because someone believed you had something valuable to contribute. They were right.

So, when it feels hard — and it will — when the papers are late again, when the meeting overruns again, when you're not sure you're making a difference, remember why you're here. Every board paper, every assurance report, every risk discussion, every challenge and every decision should ultimately be capable of

answering the question: So *what*? If we cannot answer it, perhaps we need to ask a better question, gather better evidence, make a different decision.

Good governance is not simply about doing things properly. It is about making sure that what we do matters.

Thank you for reading

Contact Information

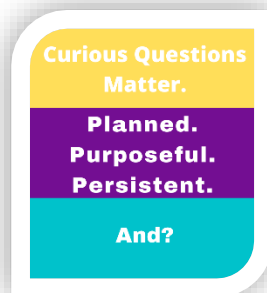
Fee Stagg, BA Hons, FRSA

Independent Governance Professional and Governance Consultant

Trading as SBW Governance (sole trader)

Email me on fiona@sbwgovernance.co.uk

Find me on LinkedIn [Fee Stagg | LinkedIn](#)



SBW Governance

© 2026

A Selection of Acronyms and Abbreviations

This is not an exhaustive list!

Acronym		Notes/Context
A8	Attainment 8	Secondary performance measure
ACE	Adverse Childhood Experience	
AEN	Additional Educational Needs	
AoA	Articles of Association	Academies
ASP	Analyse School Performance	Data
ATH	Academy Trust Handbook	Academies
BAME	Black, Asian and Minority Ethnic	Often now replaced by 'Global Majority' or 'minoritised ethnic groups'
BME	Black and Minority Ethnic	See BAME above
CAF	Common Assessment Framework	Early Help - may be called EHA (Early Help Assessment) in some areas
CAMHS	Child and Adult Mental Health Service	Also, Young Minds
CCE	Child Criminal Exploitation	Safeguarding - includes county lines
CEO	Chief Executive Officer	Academy trusts
CFO	Chief Financial Officer	Academy trusts
ChIN	Child In Need	Safeguarding
CIF	Condition Improvement Fund	Academies
CLA	Children Looked After	Sometimes called LAC
CoG	Chair of Governors	LGB and maintained schools
COO	Chief Operating Officer	Academy trusts
CPD	Continuing Professional Development	Training and development
CPOMS	Child Protection Online Management System	Safeguarding recording system (brand name but widely used)
CRB	Criminal Records Bureau	Old term - now DBS
CSC	Children's Social Care	Safeguarding
CSE	Child Sexual Exploitation	Safeguarding
CSI	Catholic School Inspection	
DBS	Disclosure and Barring Scheme	Used to be called a CRB check
DDA	Disability Discrimination Act	
DFC	Devolved Formula Capital	Funding
DfE	Department for Education	Government department
DSL	Designated Safeguarding Lead	Safeguarding – often the Headteacher
EAL	English as Additional Language	
EBacc	English Baccalaureate	Secondary - performance measure
ECT	Early Career Teacher	Replaces NQT
Ed Psych	Educational Psychologist	
EEF	Education Endowment Foundation	Online toolkits
EHA	Early Help Assessment	Sometimes called CAF
EHCP	Education Health Care Plan	
EHE	Elective Home Education	A term used to describe a choice by parents to provide education for their children at home (or elsewhere) instead of sending them to school full-time
ERG	External Review of Governance	
ESFA	Education and Skills Funding Agency	
EVER 6	Ever 6 Free School Meals	Pupils recorded on the School Census who were recorded as known to be eligible for FSM in any of the termly censuses in the past 6 years
EWO	Education Welfare Officer	
EYFS	Early Years Foundation Stage	Reception class

EYPP	Early Years Pupil Premium	Funding for 3-4 year olds
FFT	Fisher Family Trust	Data
FGB	Full Governing Board/Body	The main board meeting
FGM	Female Genital Mutilation	Safeguarding
FOI	Freedom of Information	
FSM	Free School Meals	
FTE	Full Time Equivalent	Staffing
GAG	General Annual Grant	Academies - made up of school budget share and minimum funding guarantee (MFG)
GB	Governing Board	Sometimes called governing body
GCSE	General Certificate of Secondary Education	Secondary qualifications
GDPR	General Data Protection Regulations	From 25 May 2018
GIAS	Get Information About Schools	DfE database
HMI	His Majesty's Inspector	Ofsted inspector
HR	Human Resources	People
HT	Headteacher	Common abbreviation
HTLA	Higher Level Teaching Assistant	
HTPM	Headteacher's Performance Management	
ICFP	Integrated Curriculum Financial Planning	
ICT	Information and Communications Technology	
IDSR	Inspection Data Summary Report	Primary and secondary
IEB	Interim Executive Board	GB of a school in Special Measures
IMF	Integrated Mainstream Fund	
INSET	In-Service Training Day	Staff training days, 5 per year
IOG	Instrument of Government	GB structure - legal document setting out constitution – maintained schools
IQM	Inclusion Quality Mark	Award for inclusive practice
ISR	Individual School Range	Used in pay decision for senior leaders
ITT	Initial Teacher Training	
KCSIE	Keeping Children Safe in Education	Statutory safeguarding guidance
KPI	Key Performance Indicator	
KS1	Key Stage 1	Years 1-2
KS2	Key Stage 2	Years 3-6
LA	Local Authority	Sometimes called council
LAC	Looked After Child	Sometimes called CLA
LCSB	Local Children's Safeguarding Board	
LGB	Local Governing Board/Body	Academy trusts
LGBTQ+	Lesbian, Gay, Bisexual, Transgender, Queer/Questioning +	Equality and inclusion
MASH	Multi-Agency Safeguarding Hub	Safeguarding referrals
MAT	Multi-Academy Trust	
MFL	Modern Foreign Languages	
MLD	Moderate Learning Difficulties	SEND
NC	National Curriculum	
NEET	Not in Education, Employment or Training	Post-16
NFER	National Foundation for Educational Research	
NGA	National Governance Association	
NLE	National Leader of Education	
NOR	Number on Roll	You must keep this under review
NPQ	National Professional Qualification	
NQT	Newly Qualified Teacher	Now replaced by ECT

Ofqual	Office of Qualifications and Examinations Regulation	Responsible for regulating GCSEs, AS and A levels in England and a range of vocational and technical qualifications
Ofsted	Office for Standards in Education	
P8	Progress 8	Secondary performance measure
PA	Persistent Absence	Attendance
PAN	Planned Admission Number	
PI	Performance Indicators	
PP	Pupil Premium	Also think about sports premium
PPA	Planning, Preparation and Assessment	
PRP	Performance Related Pay	
PRU	Pupil Referral Unit	Also, Alternative Provision
PSED	Personal, Social and Emotional Development	
PSHE	Personal, Social, Health, and Economic Education	Curriculum subject
PTA	Parent Teacher Association	
QA	Quality Assurance	
QTS	Qualified Teacher Status	Teacher qualification
RIDDOR	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations	
RPA	Raising the Participation Age	Post-16
RSC	Regional Schools Commissioner	
RSE	Relationships and Sex Education	Statutory from 2020
SALT	Speech and Language Therapy/Therapist	SEND
SAO	School Attendance Order	Attendance/EHE
SAR	Subject Access Request	Right of access under GDPR
SATs	Standard Assessment Tests	KS1 and KS2
SBM	School Business Manager	Also, School Business Leader or Bursar
SCR	Single Central Record	Safeguarding - record of pre-employment checks
SDP	School Development Plan	Sometimes called improvement plan or academy improvement plan
SEF	Self-Evaluation Form	
SEMH	Social, Emotional and Mental Health	SEND category
SEN	Special Educational Needs	Often used interchangeably with SEND
SENCO	Special Educational Needs Co-ordinator	
SEND	Special Educational Needs and Disability	
SFVS	School Financial Value Standard	Maintained schools only
SIAMS	Statutory Inspection of Anglican and Methodist Schools	
SIP	School Improvement Plan	Same as SDP
SIP	School Improvement Partner	Can cause confusion with above!
SLA	Service Level Agreement	
SLCN	Speech, Language and Communication Needs	SEND
SLT	Senior Leadership Team	
SMSC	Spiritual, Moral, Social and Cultural Development	
SoD	Scheme of Delegation	Academies
SpLD	Specific Learning Difficulty	SEND - includes dyslexia
SRMA	School Resource Management Advisor	Academies
SSSNB	School Support Staff Negotiating Body	
STA	Standards and Testing Agency	
STPCD	School Teachers' Pay and Conditions Document	Sets out statutory pay and conditions

TA	Teaching Assistant	
TLR	Teaching and Learning Responsibility	Pay allowance
TOR	Terms of Reference	
TSA	Teaching School Alliance	
TUPE	Transfer of Undertakings (Protection of Employment)	HR - staff transfers
UFSM	Universal Free School Meals	
UPN	Unique Pupil Number	Each pupil has one
URN	Unique Reference Number	Each school has a unique number
VA	Voluntary Aided	School type - maintained school
VC	Voluntary Controlled	School type - maintained school
VFM	Value for Money	
Virtual School	Virtual School	Works in partnership with the child or young person's school/educational setting to ensure that they are supported to fulfil their potential at all stages of their education
VLE	Virtual Learning Environment	
VSH	Virtual School Head	Looked After Children
YOT	Youth Offending Team	Safeguarding

Note: This list includes the most commonly used acronyms and abbreviations in school governance and education in England. Some acronyms may have multiple meanings depending on context (e.g., SIP can mean School Improvement Plan or School Improvement Partner).

You may also find this useful [Academies: A to Z of terms - GOV.UK](#)

Some other sources of information

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

Governor Hub A subscription service used by many schools to handle and share information.
<https://governorhub.com> The Glossary cannot recommend Governor Hub highly enough. It is amazing.

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

Independent Governor Support www.independentgovernor.com

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

National Association of School and College Clerks – an independent organisation for clerks and governance professionals www.nascc.co.uk

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

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

[Trust Governance Insight \(TGI\)](#) is a brilliant a network for academy clerks and governance professionals. (subscription costs)

Useful Links

[https://www.ascl.org.uk/ASCL/media/ASCL/Help and advice/Leadership and governance/NGA-Being-Strategic-20pp-\(June-2023\)-SS-WEB-AW.pdf](https://www.ascl.org.uk/ASCL/media/ASCL/Help%20and%20advice/Leadership%20and%20governance/NGA-Being-Strategic-20pp-(June-2023)-SS-WEB-AW.pdf)

[What school leaders and those governing should expect from each other | Local Government Association](#)

The End...or is it?