

# Governor Induction Training Programme

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What we  
will be  
looking  
at....

The role of Governors  
Principles and Attributes

**The Three Key Areas**

- **Strategic Leadership**
- **Accountability**
- **Financial probity**

Effective Governing Bodies  
Making it work and  
Evaluation

# Resources from this course

Go to this Dropbox folder <https://bit.ly/3c8TKCU>

# Welcome to Governance!

There are around 350,000 governors in England and in Calderdale we have around 1,500 governors. The vision for the Local Authority is that all children in Calderdale are happy, safe and successful and governing bodies play a large part in achieving this vision.

The Local Authority offers support and training for all governors in Calderdale through their Governor Support Service. Calderdale also have a Governors Association that enables governors to network with each other and discuss important issues. Contact details are:-

***Debby Simpson, Governor Support Service*** [debby.simpson@calderdale.gov.uk](mailto:debby.simpson@calderdale.gov.uk)

Telephone: 01422 394059

Calderdale Governors Association Email: [calderdalegovs@gmail.com](mailto:calderdalegovs@gmail.com)

# Introductions

- Name
- size and category of school
- type of governor
- length of time you have been a governor
- number of meetings you have attended
- why you are here and what do want to achieve?



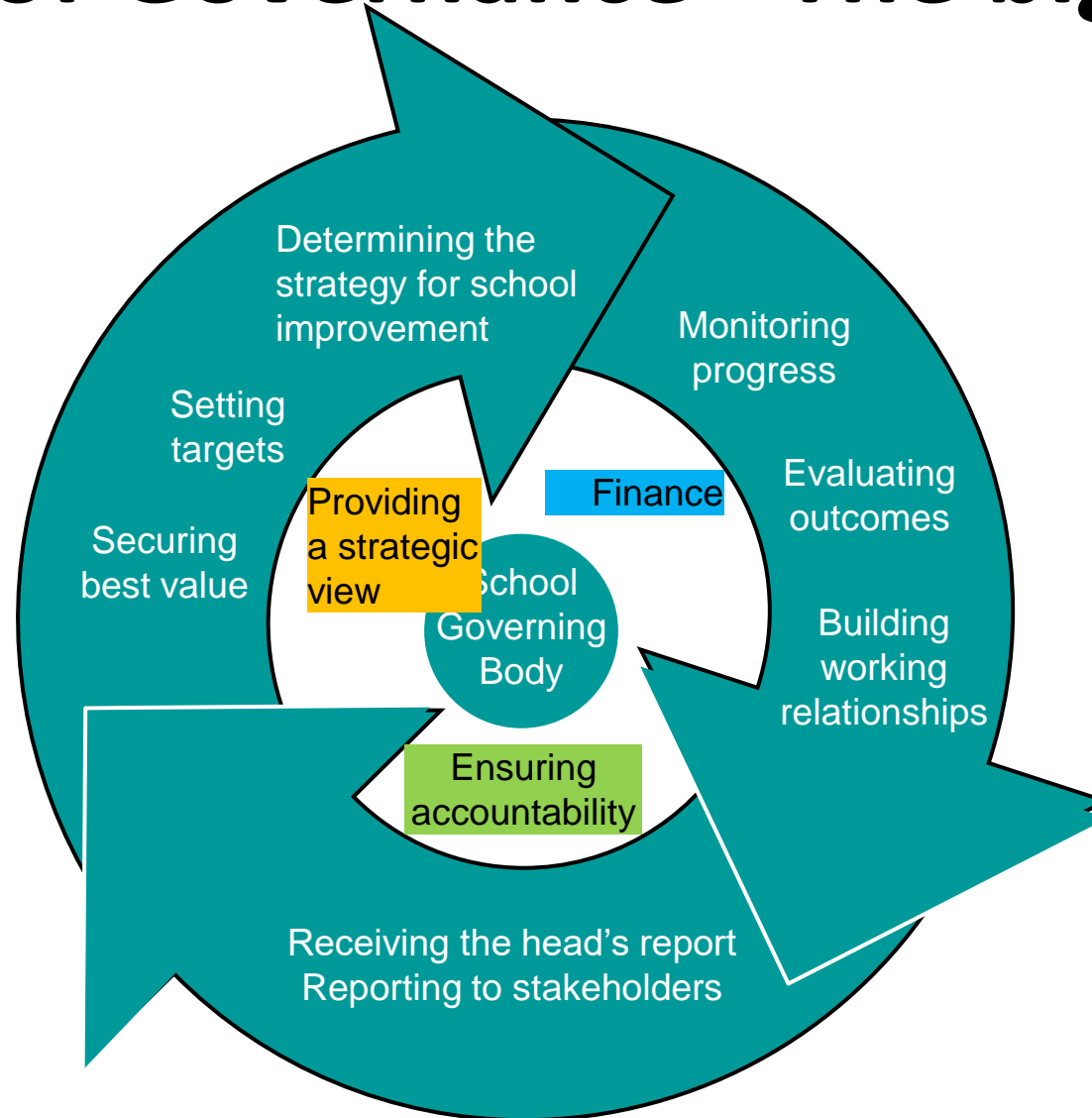
# DfE Governance Handbook

Three core functions:

1. ensuring clarity of vision, ethos and **strategic direction**
2. **holding executive leaders to account** for the educational performance of the organisation and its pupils and the performance management of staff
3. overseeing the **financial performance** of the organisation and making sure its money is well spent.



# The Role of Governance - The big picture



# What skills and knowledge are needed?

Have a look at the statements on the sheet. Which do you think are the most important?

Which statements do you think you need to find out more about or prioritise for yourself?



# Principles and Personal Attributes

Personal attributes are as important as skills and knowledge.

These qualities enable governors to use their skills and knowledge to function well as part of a team and make an active contribution to effective governance.

What personal attributes do you think a governor should have?



We will thought shower them together

# The seven C's of being an effective governor

- **Committed** Devoting the required time and energy to the role.
- **Confident** Able to contribute to conversations and to play an active role on the board.
- **Curious** Meaningful questioning.
- **Challenging** Providing appropriate challenge and always driving for improvement.
- **Collaborative** Prepared to listen to and work in partnership with others.
- **Critical** Understanding the value of critical friendship which enables both challenge and support.
- **Creative** Able to be open-minded about new approaches to problem-solving.

# The Nolan Principles

- Selflessness
- Integrity
- Objectivity
- Accountability
- Openness
- Honesty
- Leadership



# Corporate Responsibility of the board

- **Authority rests with the whole governing body.** Collective responsibility should be taken for the outcomes. How individual governors vote is confidential. Declarations of interest should be taken
- **The chair can act in an emergency,** but must inform the whole governing body at the earliest opportunity
- Provided governors act honestly, reasonably and in good faith any liability will fall on the governing body.

# Scenarios to consider

Individual or corporate responsibility?

In your groups discuss your allotted scenario.

Feedback to the whole group afterwards



## **Julie's dilemma**

**Governors have discussed admissions criteria and are proposing changes. Julie is a parent governor. Her closest friend has a child who wants to apply for a place. These changes will make it more likely that her application will be accepted.**

Should this interest have been declared?  
When? What are the consequences of non-declaration?

## **An efficient governing body?**

**The Chair and Headteacher have discussed changes to the staffing structure in school. They recommend that governors accept their proposal outlined in a 35 page paper emailed the previous day. This is voted through after a brief discussion as the Chair and Head had spent a lot of time working out the proposals.**

What mistakes or possible omissions are being made? What could be done differently?

# Which interests should be declared?

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Directorship of a company?

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Employment?

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Political involvement?

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Hobbies and leisure activities?

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Financial investments?

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Personal relationships?

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*What principles are involved in this decision?*

In this next section we will focus on the strategic leadership role of governors.





# Responsibility of Governors

*Extract from Ofsted Inspection Framework*

- those responsible for governance understand their role and carry this out effectively. They ensure that the provider has a clear **vision** and **strategy** and that resources are managed well. They hold leaders to account for the quality of education or training
- those with responsibility for governance ensure that the provider fulfils its statutory duties, for example under the Equality Act 2010, and other duties, for example in relation to the 'Prevent' strategy and safeguarding, and promoting the welfare of learners

*See full extract on handout*

# Why have a vision?

Clarity of vision is the first of the three core functions for every governing board. It's up to the governors and trustees to ensure that the vision, ethos and strategic direction of the school are clearly defined.

*'Our view is that the school's vision should state explicitly what the school will look like in three to five years' time, including a concise expression of what the children will have left the school having learned. How your vision will be met will be determined by the school's ethos and values – both matter but they are different.'* NGA 2021

# Setting the Vision and Values ('Intent')

## Values

A value is a principle that guides our thinking and behaviour.

Governing boards are responsible for the values of the organisation, which should be at its core and a reference point for all decisions. The organisation's values underpin its culture, strategy, policies and procedures. They should encompass the Nolan principles, such as integrity, but also others that are particular to the school, which could include inclusivity, generosity and respect. They may help to distinguish a school from others.

## Vision

The school's vision should, in a few sentences, describe what the school will look like in three to five years' time.

Every organisation needs to have a vision of what it is trying to achieve. You should be aiming to continuously improve, to make the experience of the school the very best it can be for pupils, parents and staff. Projecting forward a few years, what specific goals do you want the school and its pupils to have achieved? There is no need to rewrite the vision annually, but it is good practice to review it.

Resource Pack



# **Your vision... *your intent***

Where would you like your school to be?

**The school has excellent  
academic results**

**The pupils seem  
really confident**

**There's a great pastoral  
system—children are  
cared for**

# So how does it work?

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Regular review of the school vision and values – maybe at the AGM.

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Use the **information** provided by the headteacher to help decide on strategies for improvement next year.

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Engage with **stakeholders** – pupils, parents, staff to make informed decisions.

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Review the end of year **data and advice** from external advisors to set the scene for the next year or few years.

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*See full extract on handout*

# The School Improvement Plan

The Plan is the key strategic document of the school.

It should be reviewed and evaluated at each Governing Body Meeting.

***Question: Do you know the priorities your school is working on?***



# Effective School Improvement Plans (1)

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- state the agreed **values, aims and objectives** for the school and focus on raising standards of educational achievement
- reflect **local and national trends** and initiatives that might impact on the school e.g. rising/falling rolls attainment data
- are derived from **rigorous self-evaluation** (N.B SEF)
- are **shared and understood** by all concerned



# Effective School Improvement Plans (2)

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- have SMART targets (specific, measurable, achievable, relevant and time-limited)
- have named people responsible for action
- have explicit links to the school budget
- identify training and support needs
- state the evidence that will demonstrate success
- make clear how, when and by whom progress will be monitored and evaluated
- Drive the agendas for governing body meetings & head's objectives

# Activity

Look at the sample School Improvement Plan. What are the key features of this plan that you like or dislike?

If this was part of *your* school's plan, how might you get involved in monitoring?



# Who does what? Head or governors?

1. Writes and formulates the school improvement plan
2. Agrees the final school development/improvement plan
3. Drafts detailed action plans
4. Runs the school on a daily basis
5. Approves/ratifies whole-school policies
6. Establishes an RSHE policy

# Who does what? Head or governors?

- A. Determines the aims, ethos and priorities of the school
- B. Produces the budget headings
- C. Monitors the school's financial management, including the impact of the pupil premium spending
- D. Acts as a critical friend – asking supportive and challenging questions
- E. Determines and implements an appropriate curriculum for the school
- F. Approves the number of staff at the school and the level of the posts

# Making it work....

Revisit the starter activity.

What more do you need to know? Where will you look for help? What will you discuss with your chair?





Calderdale Governors' Association  
*Supporting excellence in  
Governance*

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Thank you for volunteering to be a school governor within Calderdale. We would like to welcome you all to the largest volunteer force in the country. There are approx. 1500 school governors/trustees in Calderdale and everyone irrespective of school type i.e. maintained/academy or free is automatically without charge, a member of CGA.



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Who we are:

Tony Hillyard, NLG

Chair & Webmaster

John Eccleston

Vice Chair

Visit CGA website: [www.calderdalegovs.org.uk](http://www.calderdalegovs.org.uk)

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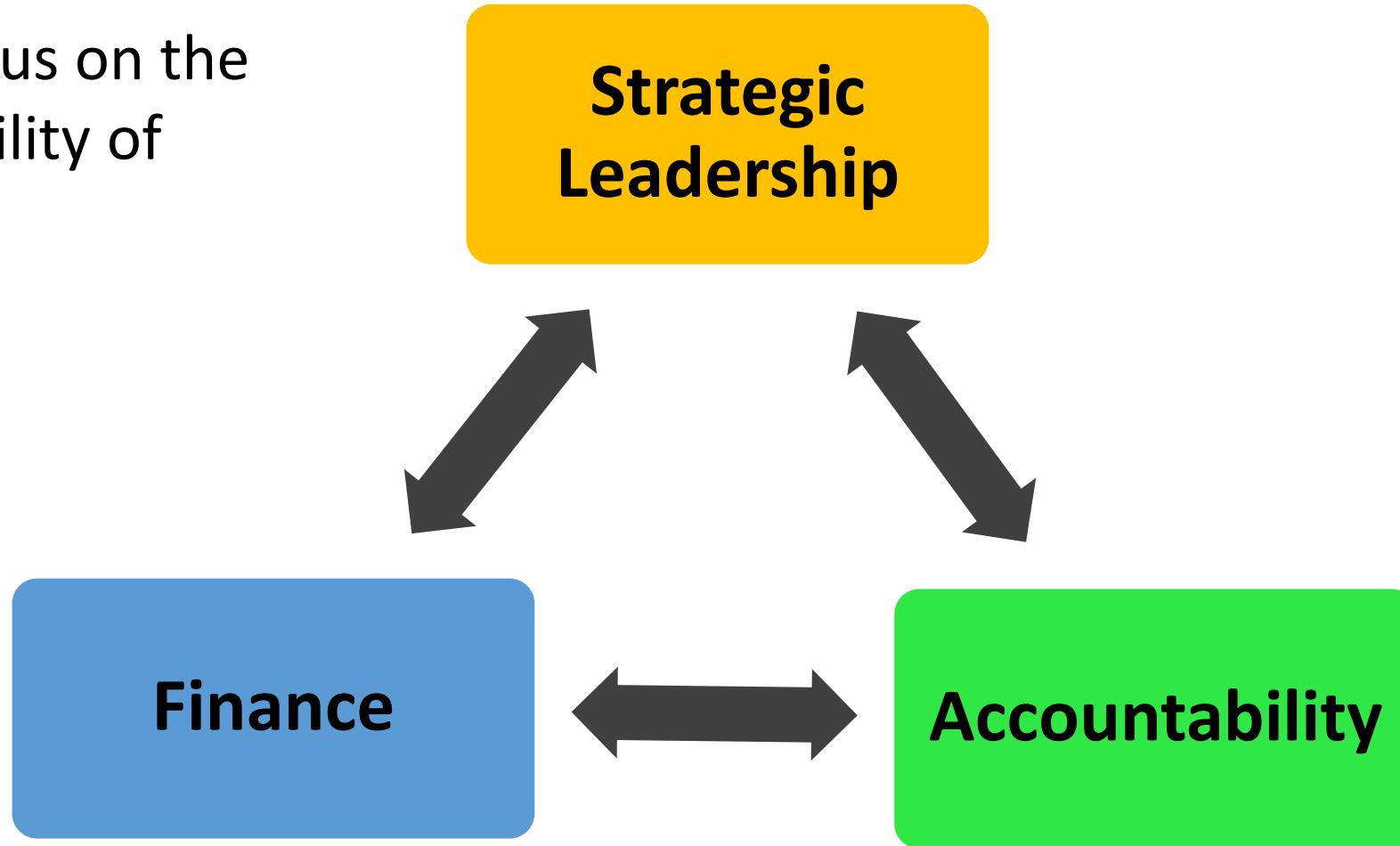
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# Responsibility of Governors

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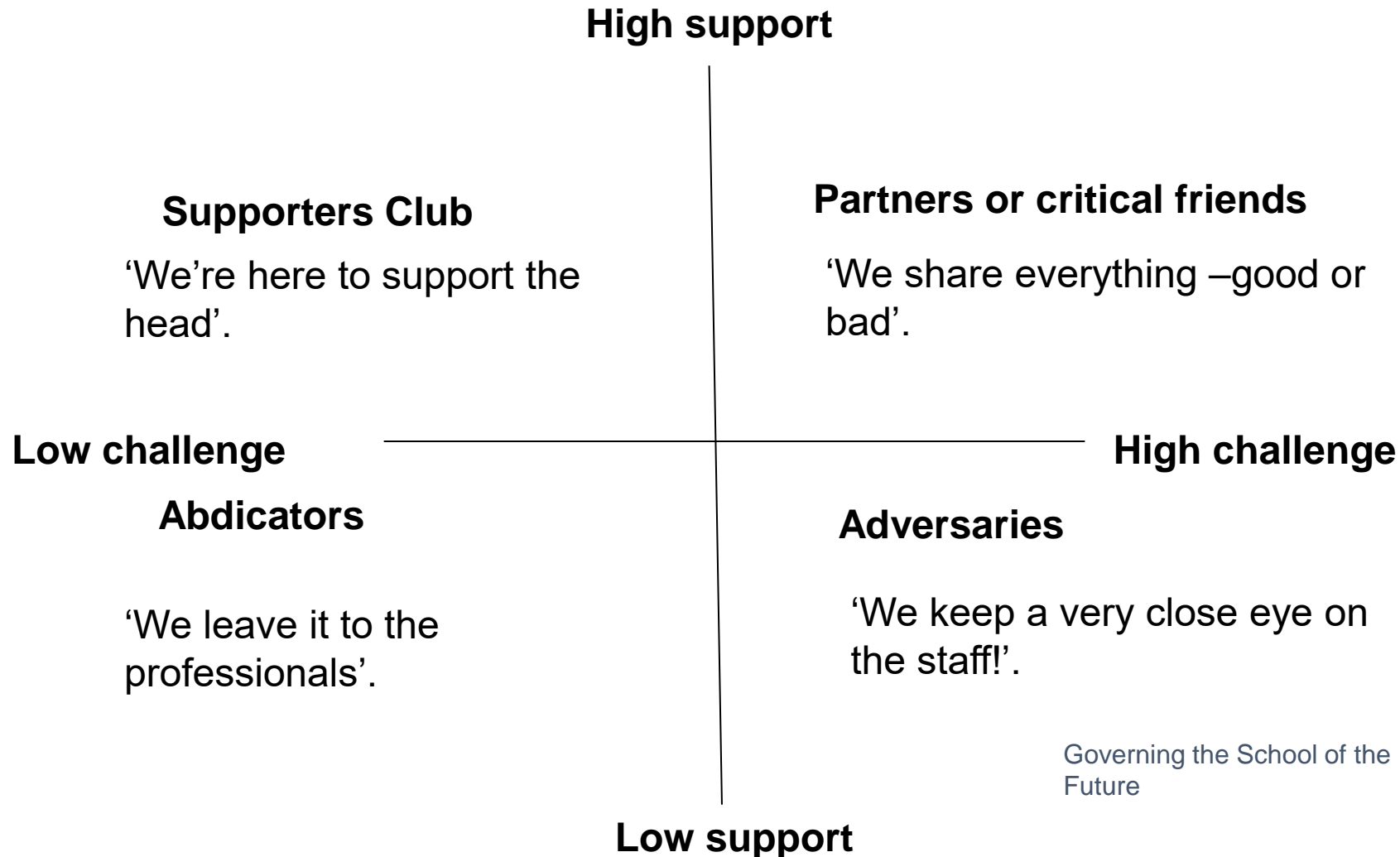
- those responsible for governance understand their role and carry this out effectively. They ensure that the provider has a clear vision and strategy and that resources are managed well. They hold leaders to account for the quality of education or training;
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*See full extract on handout*

# Governors need to ....

- performance manage the headteacher rigorously
- understand the impact of teaching, learning and assessment on the progress of pupils currently in the school
- ensure that assessment information from leaders provides governors with sufficient and accurate information to ask probing questions about outcomes for pupils
- Be transparent and accountable, including in recruitment of staff, governance structures, attendance at meetings and contact with parents.

# Where does your governing body sit?



# Monitoring or evaluation?



HEAD

## Monitoring

- gathering evidence to show what progress has been made towards strategic priorities and targets, and the implementation of policies



GOVERNORS

## Evaluation

- making judgements about the results
- are pupils doing better than expected given their previous attainment?
- is the school adding value?

# Attainment and achievement

## Attainment (Results)

- a 'snapshot' of how a child is doing at a specific point in time
- linked to National Curriculum Key Stages
- shown in marks or grades in relevant national tests or examinations or school-based assessment

## Achievement (Progress)

- an assessment of pupils' knowledge, understanding and skills in relation to their capability
- reflects the progress they make in relation to pupils of similar capability
- a judgement about whether pupils are doing as well as they can

# Data and its use

As a governor you will receive regular and timely updates from the SLT of the school.

Qualitative Data

Quantitative Data

What is the difference between them?  
Can you think of examples of each?  
Which is more important?

You need a  
**VARIETY** of  
**RELEVANT** data  
to be effective



# Sources of information

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**School self-evaluation activities** –summarised in the Self-Evaluation Form or evaluation of the School Improvement Plan

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**Observation and discussion** whilst on visits to the school

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**Reports** from the headteacher and other staff

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**Performance data** provided by the DfE & Analysis of School Performance (ASP)

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**Ofsted** inspection reports

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**Monitoring visit reports** from the School Improvement Partner / School Effectiveness Officer

# The Head's Report

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fulfils their **accountability** to the governing body;

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provides a clear and permanent record of key aspects of the school's work and **progress against the school improvement plan.**

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should be **sent to members of the governing body** together with reports from other staff, at the same time as notices of meetings.

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*A tip – suggest the agenda item is called: **Headteacher's report and governors' questions.***

# **The Head's Report: your turn**

Look at the sample report. Discuss these questions and then feed back.

- How does this help you fulfil your role of 'holding to account'?
- Is there anything missing?
- What else do you need to know?
- What questions would you generate?

# Using the ASP (Analyse School Performance)

## **The ASP will include:**

- data on attendance, achievement and attainment at each key stage;
- comparisons with like schools and the national averages.

*This used to be published as the RAISE Online and data dashboard.*

## **Governors can use this:**

- to check against the picture of the school shared by the head/SLT;
- to check if school's internal data predications were accurate.

*If there are anomalies, governors need to find out why there are differences and what is being done to correct this.*

*The public view of your school data can be found at: [www.compare-school-performance.service.gov.uk](http://www.compare-school-performance.service.gov.uk)*

# So what do you know now?

Can you decide which of the statements in our powers and duties quiz are true or false?



# Policies: true or false?

1. The school is responsible for writing the policies for the school.
2. All schools must provide sex education.
3. Policies should be reviewed at regular intervals to ensure they are still relevant.
4. All schools must have a race equality policy.
5. Schools should develop policies without reference to any other organisation.

# Personnel: true or false?

6. The governing body decides the number of staff in a school.
7. The full governing body should lead on the selection of staff in the leadership team
8. Governors must be involved in the appointment of all staff.
9. Governing bodies do not have to make reasonable arrangements to support the employment of a disabled person.
10. The whole governing body must set objectives for the headteacher, as part of their responsibilities for performance management.
11. No member of staff can be dismissed unless the whole governing body agrees.

*The answer sheet is in Dropbox*

In this next section we will focus on the finance role of governors.





# Responsibility of Governors

*Extract from Ofsted Inspection Framework*

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*See full extract on handout*

# Governors and Finance

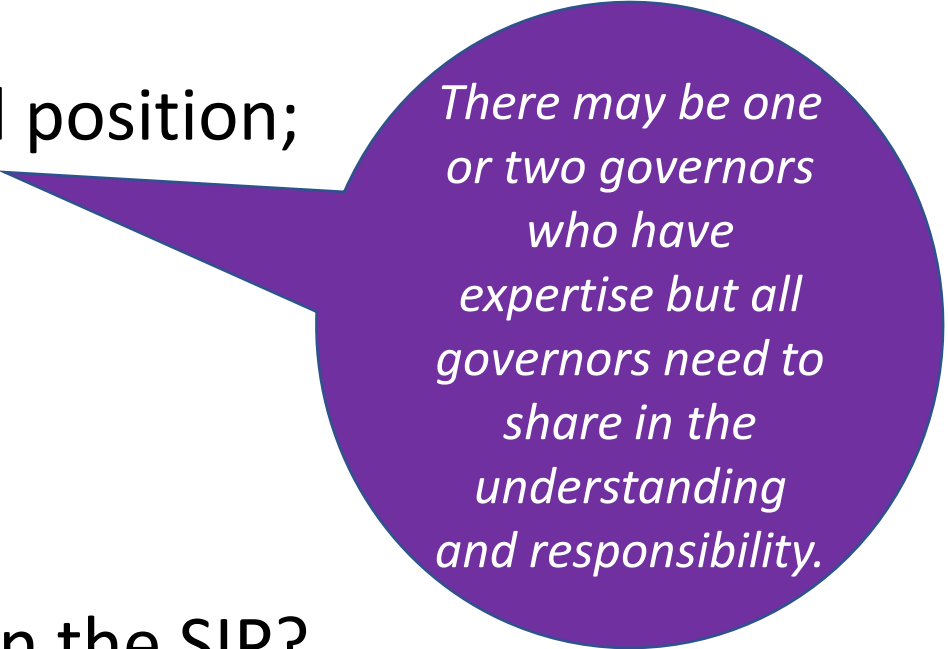
- [Governors]...ensure that the school's finances are properly managed and can evaluate how the school is using the pupil premium, Year 7 literacy and numeracy catch-up premium, primary PE and sport premium, and special educational needs funding

*Ofsted 2018*

# Financial monitoring

## All governors need:

- an **overall understanding** of the financial position;
- grasp of key **financial data**;
- the ability to ask **probing questions**.



*There may be one or two governors who have expertise but all governors need to share in the understanding and responsibility.*

## Key questions:

1. Do financial decisions link to priorities in the SIP?
2. What impact do financial priorities have on pupils' learning?
3. Does the school provide value for money?

# Understanding the Financial Summary

The Governing Body will regularly review the financial summary of the school. Governors must agree the school budget at an annual meeting, but keeping an eye on the finances is a core role of all governors.

A key question to ask is about the extra funding schools receive, e.g:

- How has the Pupil Premium money had an impact on standards?
- How has the sports premium funding supported staff in developing their PE teaching?

# The financial summary

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Have a look at the financial summary excel sheet. Remember to focus specifically on external income – Covid Catch Up, Pupil Premium, High Needs Top Up, Sports Grant.

What questions would you like to ask about it?

What parts do you need clarification on?



# Budget Scenarios

At a budget setting meeting you notice a proposal for an additional £1500 for a TLR\* to develop ICT.

You also see that the school has decided to defer the purchase of new ICT equipment.

What would you ask?

The school wants to buy a new minibus. You want to know is it worth it?

What questions can you ask about buying a minibus?

\* Teaching and Learning Responsibility (additional payment to a member of staff)

# Finance: true or false?

1. The chair can approve the budget.
2. The budget for a school is mainly driven by the number of pupils in the school.
3. Two schools with the same number of pupils will receive the same budget.
4. Governors should rely on headteachers to achieve value for money.
5. The governing body is responsible for the sound management of all monies generated by a school.

# Effective Governing Bodies

This next section focusses on the governing body meeting and roles and responsibilities.





# Responsibility

Evidence is needed, not just words.  
Evidence should demonstrate  
implementation and impact  
Quality matters more than quantity

*Extract from Ofsted Inspection Framework*

- those responsible for governance ensure that the provider carries out this effectively. They ensure that the provider has a clear vision and strategy and that resources are managed well. They hold leaders to account for the quality of education or training
- those with responsibility for governance ensure that the provider fulfils its statutory duties, for example under the Equality Act 2010, and other duties, for example in relation to the 'Prevent' strategy and safeguarding, and promoting the well-being of learners

It is the clerk's duty to ensure this is carried out

*See full extract on handout*

# Governing Body Meetings

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Each school has a different pattern of Governing Body Meetings.

Some schools have working parties or sub committees that meet separately and report back to the full board. These may have delegated powers and their terms of reference are agreed at the AGM.

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Most schools have at least 4 full meetings a year. These are professionally clerked and minuted.

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# Delegation

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Any function can be delegated to a committee, a governor or to the headteacher. Terms of reference need to be clear and agreed

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The governing body must review delegation annually

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The governing body remains accountable for any decisions taken including those delegated to a committee or an individual

# Link Governors

## The role of a link governor

This will vary according to the nature of the appointment, but link governors will generally:

- Make pre-arranged visits to the school, with a clear focus
- Keep the governing board informed about the area for which they're responsible, and act as a link between governors and staff
- Support the member of staff who is responsible for their particular area/subject
- Develop knowledge in their specialist area and take part in relevant training
- Make sure the school has relevant policies in place
- Monitor the implementation of the school's strategy in their specialist area

Some roles include: SEND, H&S, Safeguarding.....

Do you know  
who the link  
governors are in  
your school?

# Safeguarding

Your governing board and school have a responsibility to safeguard and promote the welfare of children, according to the statutory guidance [Keeping Children Safe in Education](#) (KCSIE).

**It is everyone's responsibility!**

[Keeping Children Safe in Education 2023](#) requires all governing boards and school proprietors to make sure all governors receive appropriate safeguarding and child protection training at the point of induction.

**Make sure you ask your chair or clerk about safeguarding training!**

# Representation

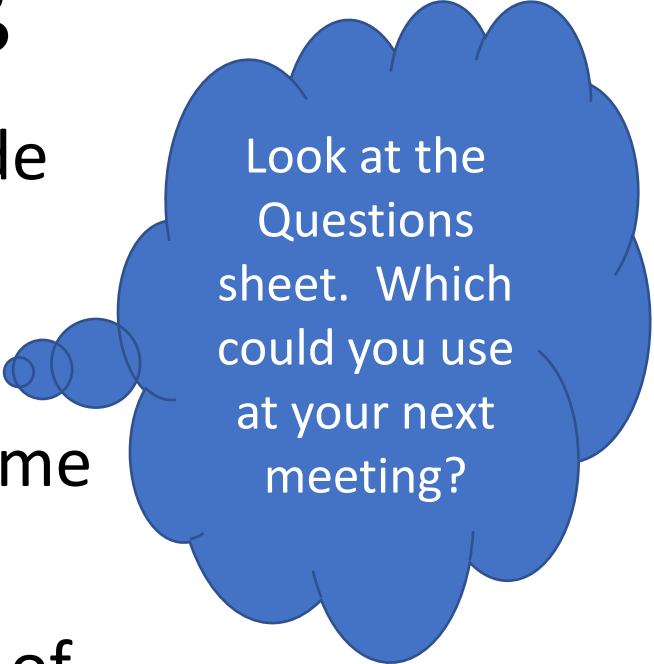
Elected governors are *representative* members of the staff/parent body rather than *mandated delegates* of staff/parents.

- Staff and parent governors should communicate with their peers and will want to listen to different views
- But when decisions are made they are free to vote in accordance with their own considered views.

# Your role in the meeting

Agendas and associated documentation should be made available at least a week before the meeting.

- You should **read all the documentation and prepare questions** (the chances are that others will ask the same questions as you, but be prepared)
- **Good questions** always relate to the three core areas of governance. Always have in the back of your mind – How is this helping the students in our school get better? What is the impact? How do we know?



Look at the Questions sheet. Which could you use at your next meeting?

# Making corporate decisions

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True or False?



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# Procedures: true or false?

1.	It is possible to vary the composition of a governing body
2.	Failure to attend meetings for six months from the date of first meeting missed, means automatic disqualification
3.	The chair and vice chair hold office for four years
4.	A governing body doesn't have to have any committees unless it chooses
5.	The clerk must be a member of the governing body
6.	Nominations for parent governors must be approved by the headteacher before election
7.	Part-time teachers may not be elected to serve on the governing body
8.	All governors serve a four-year term in office

# Procedures: true or false?

9.	The LA can remove its representatives from a governing body
10.	Elected parent and staff governors can be removed from the governing body by the headteacher
11.	The headteacher must be a member of the governing body
12.	A meeting of the governing body may only be called by the clerk
13.	Governors should be informed of meetings at least seven days before they occur
14.	The frequency of governors' meetings is not fixed
15.	Any governor may put forward an item for the agenda
16.	The headteacher has a right to attend all governor's meetings

# Making it work

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Revisit the starter activity one more time...

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What more do you need to know?

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Where will you look for help?

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What will you discuss with your chair?

# Further Training

Thursday	07/09/23	GOV15	Governor Induction	9.00am – 3.30pm
Wednesday	20/09/23	GOV16	The Governing Body's Statutory Responsibility for Children Looked After	6.30pm – 8.30pm
Wednesday	27/09/23	GOV17	Governors Asking the Right Questions	6.30pm – 8.30pm
Tuesday	10/10/23	GOV18	New to Governance	6.30pm – 8.30pm
Thursday	12/10/23	GOV19	Clerks Network 2	1.00pm – 3.00pm
Thursday	12/10/23	GOV20	Chairs Network 2	6.30pm – 8.30pm
Wednesday	18/10/23	GOV21	Safeguarding for Governors	6.00pm – 8.30pm
Thursday	26/10/23	GOV22	The Role of the SEND Governor	6.30pm – 8.30pm
Tuesday	07/11/23	GOV23A	Governor Induction Part 1	6.00pm – 8.30pm
Tuesday	14/11/23	GOV23B	Governor Induction Part 2	6.00pm – 8.30pm
Thursday	16/11/23	GOV24	Chairs Induction	6.00pm – 8.30pm
Tuesday	21/11/23	GOV25	The Role of the H & S Governor	6.00pm – 7.30pm
Wednesday	29/11/23	GOV26	Safeguarding for Governors (Refresher)	6.30pm – 8.30pm



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Vice Chair

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