



Trustee & Governor Roles and Responsibilities

Approved via Governorhub

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Aims

The Trust, Local Governance Committee and Headteacher believe it is essential that all new Members, Trustees and Governors receive a comprehensive induction package covering a broad range of issues and topics and are provided with ongoing training to fulfil their role and responsibility.

Soke Education Trust makes a commitment to ensure that everyone involved in governance is given the necessary information and support to fulfil their role with confidence. The process is seen as an investment; leading to more effective governance and retention of those who volunteer their time.

Legislation and Guidance

The Department for Education Governance Handbook, the Academy Trust Handbook, best practice guidance from The Key Governor Hub and Peterborough & Cambridgeshire County Council Governor Services have been sources used in the creation of this document. These documents should be read alongside this policy

Purpose

- To welcome new Trustees & Governors to the Board or Local Governance Committee, respectively, and enable them to meet other colleagues.
- To encourage Trustees & Governors to visit the school(s) to experience the atmosphere and understand the ethos.
- To meet the Headteacher, staff and children of the respective school.
- To explain the partnership between the Headteacher, school, Local Governance Committee and Trust Board.
- To explain the role and responsibilities of Trustees & Governors.
- To give background material on the school and current issues.
- To allow Trustees or Governors to ask questions about their role and/or the school.
- To explain how the Local Governance Committee works.

Induction

New Trustees will:

- Be welcomed to the Board by the Chair
- Be provided with glossary, copy of the Strategic Objectives and access to Governorhub
- Be offered the opportunity to visit some of the schools
- Be provided with a mentor, who can answer any questions

- Meet with the CEO, Director of Education & Chief Finance & Operations officer to find about the context of the Trust.
- Complete pecuniary interests
- Complete safeguarding training

New Governors will:

- Be welcomed to the Local Governance Committee by the Chair.
- Be invited by the Headteacher to visit the school.
- Have the opportunity to tour the school and meet staff and children.
- Receive an informal briefing on the school from the Headteacher.
- Have the opportunity to meet informally with an existing Governor who will then act as their mentor.
- Be accompanied by their mentor to their first full Local Governance Committee meeting (if required).
- Have the opportunity to review their first meeting with the mentor.

New Governors will receive:

- The school prospectus.
- A training programme.
- Details of the Local Governance Committee including their Terms of Reference.
- Dates for future Governors meetings including Committees.
- Details of how to contact the other Governors.
- Details of how to contact the school including the email address.
- Recent school newsletters.

New Governors are also recommended to read:

- The School Improvement Plan.
- The latest OFSTED report and action plan.
- Policy documents relevant to Committee membership.

Trustee & Governor Allowances

The Articles of Association of Soke Education Trust state that *“a Governor may at the discretion of the Local Governance Committee be reimbursed from the property of the Academy Trust for reasonable expenses properly incurred by him or her when acting on behalf the Academy Trust but excluding expenses in connection with foreign travel.”*

Reasonable expenses would be deemed as (not an exhaustive list):

- Childcare or babysitting (other than done by a resident and responsible person at the home address) at a market value rate.
- Care arrangements for a dependent (as above) at a market value rate.
- Support for Governors with special educational needs (e.g. audio equipment)
- Support for Governors whose first language is not English (e.g. translations).
- Car travel as per the school’s travel policy.

Claim forms can be obtained from and returned to the clerk who will check and pass them to the Finance Manager, who will authorise claims for £50 or less. Claims for more than £50 will be checked by the clerk and authorised for payment by the Headteacher.

Link Trustees/Governors and Monitoring Visits

The role of link trustees or governors is an important part of how the board and committees monitor the actions in the Strategic Improvement Plan (SIP). As an example, if English is a big focus in the SIP, an English link governor will be nominated..

Each year the Board and its committees will allocate link governor roles in alignment with the Trust/School's strategic priorities, as set out in the SIP.

Focus of Visits

Monitoring visits will focus on progress made on a selected action from the agreed priority, as identified in the Strategic Improvement Plan

They may involve:

- Observing teaching and learning in practice to witness activities you have been told about
- Discussions and interviews with staff and pupils against identified priorities and actions taken
- Seeing examples of work scrutiny and impact
- Looking at data or subject improvement plans
- Looking at the quality of resources

Potential Benefits to Trustees & Governors

Trustee & Governor visits are a requirement in order to:

- establish a collaborative approach that recognises the professional expertise, role and responsibility of trust & school staff
- establish an overview understanding of the progress being made against the priorities identified in the Strategic Improvement Plan and develop an understanding of the key priorities
- understand the quality of teaching and learning and the impact of actions in place, including the use of performance management to bring about improvement
- observe policies and initiatives in practice
- listen to the views of children through focused discussion and observation
- review how resources, including the Pupil Premium are used to support children's learning and effect rapid improvement

Potential Benefits to Teachers

It helps the school for teachers to:

- engage collaboratively with the work of Trustees & Governors and recognise their role in securing rapid and sustained improvement
- engage in partnership with Trustees & Governors to evaluate progress against priorities in the Strategic Improvement Plan; providing clear analysis as part of the responsibilities identified in the School Improvement Plan

- work as a team with Trustees & Governors, through visits and professional dialogue which deepen understanding of how effectively the school is meeting children's learning needs and improving and sustaining progress
- demonstrate the use of resources and contribute to analysis of their impact through professional dialogue and review identified in the Strategic Improvement Plan

Ground rules for Trustee & Governor visits

The crucial point to note is that Trustee & Governor visits to classrooms are not a form of inspection, in terms of making judgements about professional expertise of the teacher - that remains a task for the Headteacher and other education professionals.

Visits should not:

- Make judgements about the quality or style of teaching (even if that is the profession of the Trustee or Governor)
- Pursue personal agendas
- Monopolise teachers' time
- Arrive with inflexible pre-conceived ideas

Trustees, Governors and staff should be aware of the protocols or ground rules. This will make visits more useful and productive.

	Always	Never
Before	<ul style="list-style-type: none"> • Arrange and agree details of the visit with the Headteacher • Agree the focus which is clearly linked to the Strategic Improvement Plan • Agree level of confidentiality • Agree Purpose of visit with link staff • Discuss the context of the lesson to be observed 	<ul style="list-style-type: none"> • Turn up unannounced
During	<ul style="list-style-type: none"> • Observe any class guidelines/rules • Fulfil agreed purpose 	<ul style="list-style-type: none"> • Walk in with a clipboard • Interrupt the teacher • Judge the quality of teaching
After	<ul style="list-style-type: none"> • Thank the teacher and the pupils • Debrief with the Headteacher or other identified Governors or staff • Complete a monitoring visit form on progress and impact of the action 	<ul style="list-style-type: none"> • Leave without a word

Being Prepared

Going into a classroom or meeting needs some preparation, some 'what if...?' to agree what the Trustees or Governors will do, for example:

- What if I see pupils misbehaving when the teacher does not?

- What if a pupil asks me to do something?
- What if the teacher has problems controlling the class?

If you identify any concerns whilst preparing for the visit, these should be shared with the Headteacher prior to starting the visit.

Feedback

All visits to school must be in line with the Strategic Improvement Plan and will be reported back to the Board or Local Governance Committee using the Monitoring Visit form. (Appendix 1) These will be circulated to all Trustees or Governors, as applicable, to ensure everyone is updated on progress. Any concerns arising during the visit should be raised with the Headteacher on the day.

What should the feedback cover?

- Progress of the allocated priority in the Strategic Improvement plan
- What is working well
- What requires further development or amendment
- Issues for the Board or Local Governance Committee to consider

Commitment

One visit per term for each priority – each visit should last 45 minutes – 1hr maximum

Planning visits

Arrange with the Headteacher through the clerks email

Safeguarding

Trustees & Governors must adhere to their training and knowledge of the schools' policies relating to safeguarding, child protection and PREVENT. They must also be aware of issues relating to Health & Safety whilst carrying out any visits.

Links with other policies

Academies Financial Handbook

Governance Handbook

Health & Safety

Safeguarding and Child Protection

Appendix 1

School Monitoring Visit Report

Part 1: Plan the Visit	
Name and role of Governor(s)	
Name and role of staff member(s)	
Date and time of visit	
School objective or priority <i>This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision.</i>	
Agreed focus within Strategic Improvement Plan <i>Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that haven't been agreed with the member of staff.</i>	
Questions to ask <i>Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit.</i> <i>Share these questions with the staff member you're visiting in advance, so they can prepare.</i>	

Part 2: In the Meeting

What is the school doing within this area of focus?

How do you know the school's actions are having an impact?

What successes stood out and why?

Questions and clarifications to follow up with the Headteacher or Chair of Governors

Appendix 2

Trustee/Governor Induction Checklist

Trustee/Governor Name: _____

(Please Print In Block Capitals)

Please tick

School Prospectus.	<input type="checkbox"/>
Safeguarding Policies & Procedures	<input type="checkbox"/>
Staff Roles and Responsibilities.	<input type="checkbox"/>
Meet Mentor.	<input type="checkbox"/>
Receive details of how to contact the other Governors.	<input type="checkbox"/>
Receive details of how to contact the school <i>(including the e-mail address)</i>	<input type="checkbox"/>
School newsletter	<input type="checkbox"/>
School Improvement Plan (SIP)	<input type="checkbox"/>
Latest OFSTED report and action plan.	<input type="checkbox"/>

Receive copy of the SEF	
Read recent Headteacher's Report to Governors.	
Read policy documents relevant to committee membership.	
Premises Map.	

Has the Headteacher covered:

Background to the school	
Current issues facing the school	
Visiting the school	
Overview of the Governor's role	
Relationship between the Headteacher and Local Governance Committee	

Signed: _____ Date: _____

Please retain original signed copy for your own records and forward a copy to the Chair of Governors.