



Local Governing Body Handbook



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1. Welcome from Sir Jon Coles

Dear colleague

Thank you for the important work you do as a governor of a United Learning school. As with every other school in the country, ours rely on the commitment and goodwill of a large number of volunteers, and the time you give freely in the interests of children, young people and the community.

Governors are ‘critical friends’ of the school and its leadership: neither the ‘hostile witness’ looking to find fault, who thinks their only value is if they can point out a flaw that needs to be mended; nor the ‘undiscerning devotee’ who supports whatever the school does, right or wrong. Critical friends are committed to the success of the enterprise – to the ultimate good the school is trying to achieve, of educated, successful children passing with joy and confidence to the next stage of their life. They take time to understand fully the work being done, the aims being pursued and the way it is intended those aims will be achieved. They ask open and provocative questions which extend colleagues’ thinking; they bring their experience to bear in helping people to look at the school in a different way. They offer critique as a true friend, who wants to see their friend succeed in the things that matter most to them.

This is a difficult role, but in carrying it out, you provide immense value to schools and to United Learning as a whole. The different and diverse perspectives and experiences you bring to schools as governors help leaders to reflect, see things more clearly, spot new ways of looking at a situation and ultimately to make better decisions.

I hope that this guide is of value to you in clarifying the slightly different responsibilities of governors within United Learning and in supporting you in carrying out your role. Thank you very much for all you do for our schools and the children and communities they serve.

With best wishes,

Sir Jon Coles
Chief Executive



2. An introduction to local governance within United Learning

As part of a larger charity, a local governing body's ("LGB") role is slightly different to that of a governing body within the maintained sector or that of a standalone trust or school. In particular, the ultimate accountabilities and legal duties rest with the Group Board of United Learning, not with the LGB. However, LGBs work best when they take their responsibilities as seriously and feel as much accountability for the success – both educational and financial – of the school as any other good governing body.

The LGB is a full and formal part of the governance structure of United Learning. It holds powers and responsibilities delegated from the Group Board and acts as the representative of that Board. It therefore needs to act with the awareness that it forms part of the wider charity. LGBs, with the Board, should form a single governance community with a shared sense of mission, vision, values and culture, and a shared sense of purpose: the execution of the strategy set by the Group Board. As local governors – much closer to the school than the Group Board can be – you are ambassadors of United Learning in the school community and your knowledge and understanding of the school within its local community are essential.

We want LGBs to act in the best interests of children and young people in line with the Trust's agreed strategy. That means focusing sharply on ensuring our schools provide the very best for the children currently in their care, offering them what they need to progress and make a success of their life. It also means continuing to improve our schools for the next cohorts of young people; and making sure schools are financially sustainable so that they can serve future generations equally well.

The LGB is non-executive: its role is not to take the management decisions in the school; nor should it become operational. It acts as a critical friend to the school's leadership and management – challenging and supporting leaders on the key issues facing the school. It also plays an important role in relation to safeguarding and safety. The LGB Chair is fully involved in all key review and performance management discussions between the Head and their line manager (the Regional Director) and will speak independently to the Regional Director about those processes and other key issues.

LGBs need to support leaders in difficult moments and make them feel supported on critical decisions. Sometimes, however, the situation demands that leaders are challenged. On key issues of strategic importance facing the school, LGBs need to be unafraid to take a firm stance. If governors of a free-standing school would not accept an educational problem remaining unresolved or would consider a budget proposal unsustainable, then nor should the LGB accept a similar situation. We need you to act on behalf of the Board, making sure that the school delivers what the organisation expects of it.

We also need you, on occasions, to challenge the centre as well, making sure that there aren't unintended consequences arising from guidance or decisions we make. If, in the LGB's view, a central decision or request is not in the best interests of children who attend and will attend the school, for improving the school and for ensuring it is sustainable into the future, we encourage you to question that decision and to press until either you do understand it to be the right decision or a better one is made.

We would much prefer an LGB to be vigorous in pursuing the best interests of children than to feel annoyed or disempowered by decisions governors feel uncomfortable with. Of course, individual governors sometimes must accept that their view is a minority one and support a majority view. But we do want governors collectively to be persistent in pursuing key points in the interests of children. We find that discussions between governors and the central team are always entered into respectfully on both sides,



lead to useful learning in both directions and typically to improved decisions.

We aim to make sure that there are strong relationships between LGBs (particularly Chairs) and the central team, typically through the Local Governance Team, Company Secretary team and the Regional Director or the Director of Independent Schools.

The following is a practical guide designed to support the delivery of robust local governance. If you have any questions about any matters covered in the guide, or more generally about local governance, please contact the Head of Local Governance (governancelead@unitedlearning.org.uk).

3. United Learning governance structure

United Learning consists of two charities which are responsible for the operation of the Group's schools: United Church Schools Trust ("UCST" – Chair: Dr Rosalind Given-Wilson) governs the independent schools, and United Learning Trust ("ULT" – Chair: Dame Reena Keeble) governs the Group's academies. All the Trustees of ULT and UCST sit together as a Group Board (Chair: Christian Brodie), to which the Trustees of both entities have delegated their powers and functions. ULT and UCST have delegated decision-making powers to the Group Board but continue to exist as separate charities and to meet as appropriate. Information about the Trustees may be found [here](#).

The Group Board has responsibility for:

- Protecting the interests and assets of each charity and its schools
- Safeguarding the charitable objects
- Ensuring the maintenance of the United Learning ethos and values
- Group strategy, management and governance; and
- Financial and educational performance.

The Board has appointed three 'link' Trustees, who take a lead role in relation to certain schools:

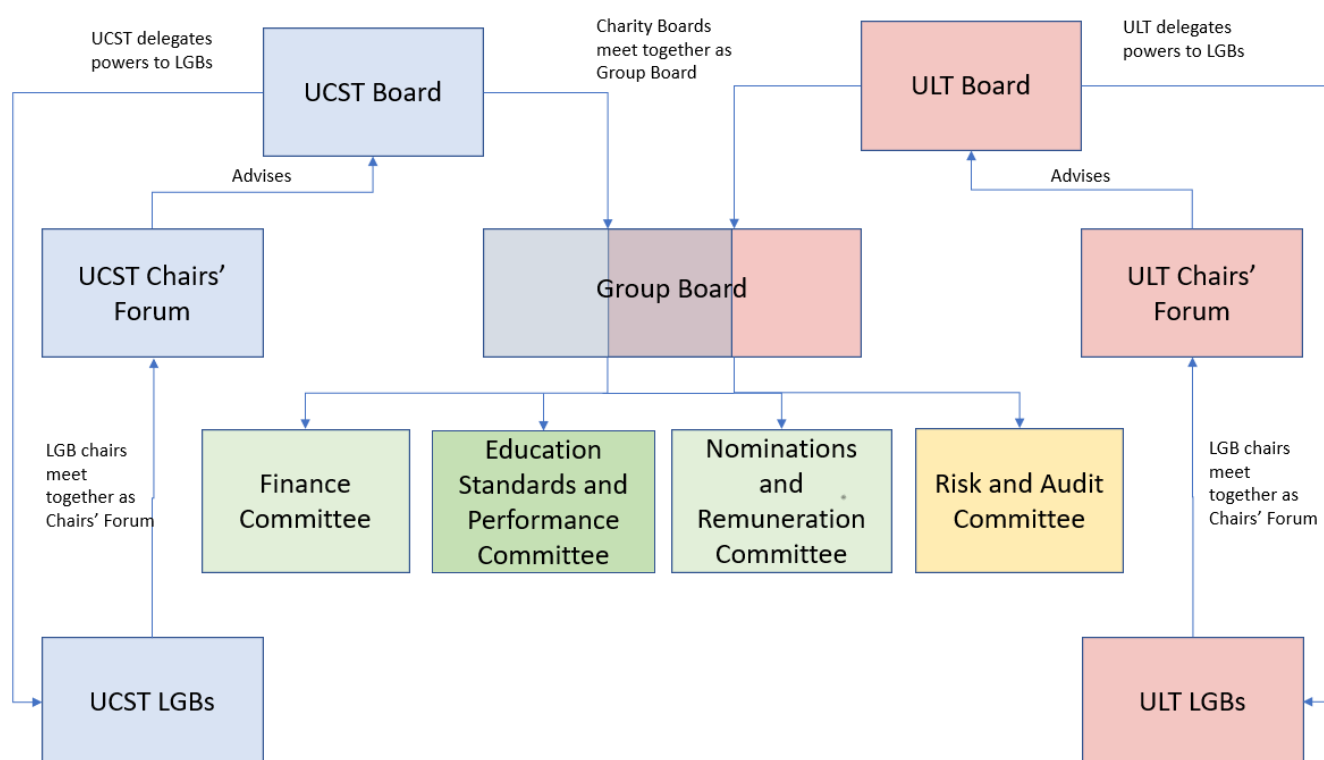
- Primary academies – Dame Reena Keeble
- Secondary academies – Dame Sue John
- Independent schools – Dr Rosalind Given-Wilson

The Group Board delegates management of the Group to the Chief Executive and the management team, who carry out leadership roles in relation to the individual schools in the Group. The Group Board consults with LGBs – seeking their contribution to the overall direction of United Learning – through the LGB Chairs' Forum. All LGB chairs and/or Vice-chairs are invited to attend this meeting.¹

The following diagram explains how LGBs feed into the overall governance within United Learning:

¹ The Chairs' Forum meetings in the Autumn and Summer terms are held online. The Spring term Chairs' Forum takes place during the annual Leadership Conference, to which LGB Chairs are invited.





4. Delegated authority

The areas in which the Group Board delegates powers, responsibilities and accountabilities to LGBs and to the Executive (centre) and Headteachers (school level) are set out in the scheme of delegation, which can be found [here](#). The intention is to give LGBs clarity regarding expectations, while providing flexibility for them to determine their own processes and ways of working, within the parameters of the scheme of delegation and this handbook.

5. Local structures – alternatives to the LGB

The powers delegated to the LGB may be exercised by a single school LGB, a cluster governing body or by a School Improvement Board ("SIB").²

Cluster governing body

A cluster governing body is where one LGB serves across two or more schools. This may be formed when schools work together in partnership, share executive leadership and a range of back-office services. The formation of a cluster governing body requires the agreement of all schools within the proposed cluster and the support of the relevant Education Director. There should be no duplication of governance where cluster governing bodies are in operation.

² Throughout this document, the term 'LGB' should be understood to include Cluster governing body and SIB, unless otherwise stated.

School Improvement Board (“SIB”)

Where school is seen to be significantly underperforming and there is a need for substantial support to drive rapid and sustainable change a SIB will be established. (Instances in which we may consider a SIB appropriate include, but are not limited to: when a school is placed in an Ofsted category or fails an ISI compliance inspection; if an LGB is deemed to have serious weaknesses; or if a school is new to the Group and a previously failing LGB has been disbanded or an interim governing body has ceased to exist.) The SIB replaces the functions and accountabilities of the LGB and remains in place until such time as the school has sufficiently improved and stabilised and is well placed to support effective local governance.

The SIB's delegated responsibilities focus sharply on rapid school improvement, in line with the current Ofsted/ISI inspection framework, while also ensuring that the school is compliant and fulfilling its statutory responsibilities, including in relation to safeguarding, provisions for pupil behaviour (exclusions), equalities, pupils with special educational needs and disabilities (SEND) and looked after children (LAC), and oversight of health and safety. The SIB works closely with the Regional Director, who attends each SIB meeting in an advisory capacity.

The decision to impose a SIB is taken by the relevant Director of Education, in consultation with the Head of Local Governance and reported to the Group Board. A SIB chair will be identified, on behalf of United Learning, by the Education Director and nominated to the Group Board. The chair will be someone with significant governance experience within a senior position who can support rapid school improvement.

The decision to transition from a SIB to a LGB or cluster governance arrangement is taken by the Head of Local Governance, in consultation with the Regional Director, SIB chair and school leadership.

Further details and terms of reference for SIBs may be found [here](#).

6. Formal constitution

The LGB is responsible for its own processes in line with legal requirements as set down in the Articles of Association ([here](#) for academies and [here](#) for independent schools) and, for academies, the Master Funding Agreement ([here](#)).

LGBs are encouraged to review and agree terms of reference at the beginning of each academic year. Models are available on request from the Local Governance Team.

7. Membership

All members of LGBs are volunteers and are appointed by the LGB on the basis of skills and experience. Eligibility for membership is set out [here](#).

The size of the LGB is likely to reflect local context (e.g. school size and complexity): LGBs should have at least 6 members, with a recommended maximum of 12.³ All LGBs benefit from a wide range of

³ Cluster governing bodies may require more members to maintain a balance of representation from each of the schools within the cluster. A SIB may have fewer members, reflecting its sharp focus on school improvement.



professional knowledge and experience and diversity of background amongst their members. We recommend that LGBs consider the age, gender, ethnicity and other protected characteristics of members so that the LGB (as far as possible) reflects the school community.

LGBs may have some or all of the following categories of member:

- Trust appointed: the Chair, in all cases
- LGB appointed: all other LGB members
- Parent: in academies, two places should be reserved for parent representation; independent schools may choose to appoint parent members
- Staff: up to two staff representatives may be appointed, provided independent (non-staff) governors are always in the majority. (A Head may not be a member of the LGB for their own school.)
- Co-opted or associate governors: may be appointed to fill a skills gap or to retain specific expertise, often for a shorter term (defined by the LGB). Do not hold voting rights.
- Foundation or ex-officio governors: only in exceptional circumstances, depending on individual funding agreements or a memorandum of understanding (MOU) negotiated at the time of the school joining United Learning; nominated by the relevant Diocese or sponsor.

Examples of membership structure:

Standalone model

6 Members	9 Members	12 Members
2 x parent	2 x parent	3 x parent
1 x staff	2 x staff	2 x staff
3 x other	5 x other	7 x other

Cluster Governing Body

2 schools (8 Members)	3 schools (11 Members)	4 schools (14 members)
2 x parent	3 x parent	4 x parent
2 x staff	3 x staff	4 x staff
4 x other	5 x other	6 x other

8. Expectations of LGB members

Whilst LGB membership of an LGB is a voluntary role, all governors need a strong commitment to the school and to improving outcomes for children. The role demands an inquisitiveness to question and analyse; and the willingness to learn. Governors need good inter-personal skills, appropriate levels of English literacy (unless an LGB is prepared to make special arrangements), and sufficient numeracy skills to understand basic data.

We expect all LGB members to:

- attend meetings regularly and to participate actively in those meetings; governors should read meeting materials in advance and be prepared to ask questions
- commit to visiting their school at least once each term
- work positively and professionally with school leaders and governor colleagues, in the spirit of co-operation and collegiality

The expectations for individual members of local governing bodies within United learning are set out in the code of conduct [here](#), which is renewed annually. We ask all LGBs to adopt this in the Autumn term and expect all governors to agree to abide by it.

9. Appointment and role of the chair of governors

The chair of the LGB is appointed by the Group Board; appointments (or re-appointments) are confirmed in writing. The LGB may be invited to support the recruitment process of a new chair and to recommend a potential candidate to the Head of Local Governance. It may be appropriate for the appointment to be made from within the membership of the LGB (particularly where the LGB has given due thought and attention to succession planning), provided the process is fair and perceived to be so.

Prospective LGB chairs are interviewed by the relevant link Trustee (generally via a TEAMS call). The link Trustee then makes a recommendation to the Group Board for approval. The LGB chair recruitment process is outlined [here](#).

United Learning chairs usually serve a three-year term of office. This term is renewable by the Group Board, with the consent of the post-holder and on the recommendation of the Regional Director and the school. Best practice is that Chairs serve no more than three terms at the same school. (If this milestone is approaching, please seek advice from the Local Governance Team.)

United Learning is open to appointing two co-chairs, depending on the school's circumstances. Where a co-chair arrangement is agreed, care must be taken to determine how the work is to be shared between two individuals. This model has successfully operated during 2023-4.

The chair is responsible for oversight of all the work of the LGB, ensuring the LGB's effectiveness (including through induction and support of LGB members) and is expected to attend all LGB meetings.⁴ The chair is expected to liaise regularly with the Headteacher, with the Regional Director for the school and – where appropriate – the Education Director and link Trustee, and to keep LGB members updated on this wider involvement. The chair also represents the school more widely, including at the termly 'LGB Chairs' Forum' and in any Ofsted/ISI inspection process, and is responsible for communicating information from the centre to LGB members.

The chair is also specifically responsible for the strategic management of complaints and allegations made against the Headteacher, including:

- allegations of a safeguarding nature (safeguarding policy available [here](#)), which will involve liaison with the relevant Local Authority Designated Officer ("LADO"), United Learning Safeguarding Lead, Regional Director and HR Business Partner. Full support will be provided.

⁴ In exceptional circumstances, the vice-chair (where there is one) may be asked to deputise



- management of complaints at stage 2 of the United Learning complaints policy (here), which may involve carrying out investigation meetings, meeting with parents and staff and arranging formal hearings where necessary. Chairs may access advice and support for the management of complaints from the local governance team by emailing governancelead@unitedlearning.org.uk.

A full role description for the chair can be found [here](#).

10. Recruitment of a vice-chair

All LGBs should appoint a vice-chair. The role of the vice-chair is to support the LGB chair and to deputise, in the absence of the chair, in all matters of responsibility delegated to the chair as listed above. The role may be shared between two LGB members, taking care to determine how to share responsibilities. Cluster governing bodies may decide to appoint more than one vice-chair (for example, to represent each school within the cluster). Staff governors may not be appointed as a vice-chair within their own school.

We encourage LGBs to consider succession planning (for the chair role) when appointing to the vice-chair role.

The LGB may decide on the term of office for the vice-chair.

11. Recruitment of members

LGBs are free to determine their own process for appointing members, who should be selected on the basis of the skills and expertise the LGB deems necessary to ensure its effective operation. The process should always include an informal interview with the chair and Headteacher and completion of the appropriate application form, declaration of eligibility and skills audit.

Nominations for membership should be ratified at the next available LGB meeting. All appointments are subject to safer recruitment processes, which will include an enhanced DBS and section 128 check. Confirmation of membership can only be made once these checks have been completed. Once confirmed, new members must be registered onto the EIP. Academies must also ensure that details of new LGB members are uploaded to the DfE database – Get Information About Schools (“GIAS”).

LGB members are appointed for three-year terms, renewable on review and by mutual consent of all parties. It is good practice to serve no more than three terms at the same school. We encourage members interested in continuing to volunteer to consider joining a different United Learning LGB, where their expertise and service would be warmly welcomed.

The Local Governance Team has created a range of resources to support the recruitment of local governors. These may be found [here](#). Recruitment banners may also be loaned from Central Office contact: governancelead@unitedlearning.org.uk. Schools can also choose to register a vacancy free of charge at www.governorsforschools.org.uk.

12. Nominated governors

The scheme of delegation requires the following nominated governors:



- Welfare and Child Protection (Safeguarding), including online safety (all schools – see role description [here](#))
- Health and Safety (all schools – see role description [here](#))
- Special Educational Needs and Disabilities (all schools)
- Early Years Foundation Stage (schools with a primary phase – see role description [here](#))
- Boarding (boarding schools only)

Schools may also decide to appoint nominated governors with overall responsibility for other areas, for example:

- Pupil premium/disadvantaged pupils
- Looked-after children (LAC)
- Mental health and wellbeing
- Sustainability
- Finance
- Specific key stages
- Careers Education, Information, Advice and Guidance

Governors may cover more than one area of responsibility.

Nominated governors hold delegated responsibilities, which they exercise on behalf of the LGB. They are to be agreed and appointed (according to their skills, experience, expertise or area of interest) by the LGB at the start of each academic year. A nominated governor role may be shared between schools, for example, if a cluster governing body is in place.

Nominated governors should visit the school at least termly and meet with key personnel including, where applicable, members of the leadership team. We strongly advise LGBs to agree a protocol for nominated governor visits. They may have key lines of enquiry to follow or areas of school business to monitor on behalf of the LGB. Nominated governors are responsible for completing a written report of their visit and reporting back to the LGB.

Guidance and training for nominated governors is available and the Local Governance Team has established nominated governor networks in a number of areas to provide training and support the sharing of expertise and best practice. These take place remotely on a termly basis; nominated governors are expected to attend. Recordings of network meetings are made available on the hub [Here](#)

13. The role of the clerk

High quality, professional clerking is crucial to the effective functioning of the LGB, supporting good and effective organization and administration. The clerk is the LGB's 'governance professional' and supports the Chair to ensure the LGB is able to exercise its functions effectively and confidently. S/he must have a good understanding of the scheme of delegation, the LGB's role, functions and legal duties as set out in this handbook and the United Learning Governance Professional – Clerk's Handbook.

The Headteacher is responsible for ensuring that appropriate clerking is secured for the LGB. We strongly advise that this be in the form of a professional clerk. (It is not appropriate for the Head's PA or for school business managers, bursars or finance partners to clerk LGB meetings as they are not independent.) This



may be through a professional clerking company, a freelance clerk or via a service level agreement with a local authority. Guidance for schools looking to engage a professional clerk (for a single school or across a cluster of schools) is available from the [Head of Local Governance](#).

We provide a termly LGB clerk network and regular workshops to support all LGB clerks across the group; external clerks are encouraged to attend. The networks focus on the termly LGB agenda and raise awareness of United Learning policy and strategy development.

Schools are encouraged to consider supporting the development of effective clerking via access to the United Learning PDR process. Clerks should have access to relevant training to support their role. External qualification routes are now readily available for governance professionals at Level 3 and 4. The Local Governance Team can signpost to external qualifications on request.

14. Members' interests

All governors must complete the register of business interests at the beginning of each academic year and update this information as appropriate through the year. The model policy and proforma is available on United Hub [here](#).

At the start of each meeting, the Chair must ensure that pecuniary interests relevant to the meeting are declared by all LGB members present.

15. LGB meetings

Each school is responsible for arranging its own cycle of full LGB meetings with the LGB clerk. LGB meeting dates must be entered into the Education Information Portal ("EIP") by the LGB clerk.

The full LGB must meet three times each year as a minimum (termly). In practice most LGBs meet four times a year to allow for a largely administrative and review meeting in the early Autumn term. LGBs may decide to establish committees or to meet as a full LGB only. (Standing Committees are required – see section 13.) Meetings may be held on site, remotely or use a hybrid model as agreed by the LGB. Where meetings take place remotely it is expected that governors will visit their schools at least once per term.

The local governance team provides a 'model agenda' each term, to ensure that the requirements of the scheme of delegation are covered, and circulates this to LGB Chairs and Clerks (also placed on United Hub – previous examples [here](#)). This should form the basis for a school-specific agenda, which the Chair should agree in consultation with the Head and Clerk. The agenda and papers should be circulated five working days before the date of the meeting. Once the meeting has taken place these papers are to be uploaded onto the EIP.

Minutes must be taken of all LGB meetings. The Chair and Headteacher should review draft minutes for accuracy prior to circulation and LGB scrutiny at the next LGB meeting. Draft minutes may be uploaded onto the EIP pending their final approval and replaced once agreed as accurate. Academy LGB minutes become 'public documents' which means that they may be made available on request. This does not apply to independent schools. (Care should be taken to minute and separate confidential items to a separate 'schedule B' or 'part 2' set of minutes. These remain confidential.)



The Head is expected to attend LGB meetings to advise the LGB on matters directly related to the school. Where there is an Executive Principal or Head of School in post, s/he is also expected to attend. Members of the school senior leadership team (SLT) may be invited to attend LGB meetings to observe or present information as requested. They can be asked to withdraw as necessary once individual reports are delivered. As a courtesy, attendance of senior members of staff should be agreed with the Chair in advance of meetings.

16. Quorum

The quorum for LGB meetings is 50% of the existing LGB membership or a minimum of three governors. The quorum for SIB meetings is a minimum of two members plus the RD.

17. Committee working

LGBs may decide to carry out their work via a committee structure. If the LGB establishes committees, the dates of committee meetings should be entered into the EIP. Each committee should meet no more than once per term, with minutes shared with the full LGB. LGBs should be mindful of the additional administrative burden that complex committee structures can place on governors and school leaders.

The full LGB should agree terms of reference for each committee it establishes, in line with the scheme of delegation. For examples, please contact the [Head of Local Governance](#).

Common committee structures include:

- Quality of Education – pupil focused, covering curriculum, school improvement, teaching and learning, personal development, behaviour and welfare
- Operations – resource-focused, covering finance, health and safety, community resource
- Alumni (more usual for independent schools)
- Marketing (more usual for independent schools)

All schools are required to have a Health and Safety committee, which must meet termly. This is a statutory requirement: it is a school committee and not a committee of the LGB. The nominated governor for health and safety should attend these meetings.

18. Standing Committees

A standing committee is one formed from the LGB for specific purposes only. Standing Committees are required for the effective management of complaints, exclusions, admission appeals (Academies only), and contribute to certain HR process.

Pupil Discipline Committee (PDC)

This committee must be convened in line with DfE statutory guidance on suspensions and exclusions from school as shown [here](#) and must consist of three LGB members. Terms of reference for PDC may be found [here](#).



A PDC is convened by the LGB clerk; once convened members appoint one from their number to chair. All governors who sit on this committee require training which is provided by the centre. Staff governors may not sit on PDCs at their own school. Parent governors may be used, but care must be taken to ensure that there is no potential conflict, for example that they have a child in the same year group, or know of the child or situation to be reviewed.

Clusters may form cluster PDCs whereby any eligible governor from any cluster school, including a staff governor from a different school within the cluster may be called upon to support a PDC where required by a cluster school.

Complaints Committee

This committee must be formed where it is necessary to hear a complaint at Stage 3 of the United Learning complaints policy as shown [here](#) and must consist of three members who have no prior knowledge of the issue, including one who is independent of the school/management. An independent governor member may be selected from the cluster or from any United Learning school. The Local Governance Team will provide support to broker an independent panel member. Training for the management of complaints is available and strongly advised.

Admissions/appeals

While most of the responsibilities in relation to admissions will normally be carried out by the full LGB, it may on occasion be necessary to establish an admissions committee (in situations where admissions - whether at the normal point of entry or in-year - are not coordinated by the local authority, or to hear appeals against admissions decisions). This committee should be formed of three members of the LGB. Further details are available in the United Learning admissions policy [here](#).

Where a standing committee is required, members of other United Learning LGBs may be used to secure required numbers or to provide additional independence from the school. Requests for additional governor support should be made to other cluster schools in the first instance.

All committees, including standing committees must be appropriately clerked, and where appropriate, outcomes reported back to the LGB.

In some instances, governors may also be asked to sit on school panels, for example:

- pay moderation panels, to consider pay recommendations for staff
- to hear disciplinary, grievance and capability procedures for staff

Such panels are not committees of the LGB but school committees, which a representative of the LGB is invited to attend. Panels will be convened in line with United Learning policies and procedures and supported by the relevant United Learning HR Business Partner.

19. Oversight of School Policies - The role of the LGB

Schools have access to a [Policy portal](#) located on United Hub. It is a useful resource containing the most up to date United Learning policies, guidance documents and templates (applicable for both mandatory and regulatory policies).



The LGB plays an important role in giving scrutiny and sign off to template (model) policies to ensure that the integrity of the model is maintained when tailoring a policy to the school. Examples of templates include Safeguarding, behaviour, attendance and exclusion. Scrutiny and sign off of template policies may be delegated to a relevant committee if such a structure is used.

The LGB is simply asked to ‘adopt’ other policies, which are approved by the group Board. These are updated centrally as required and schools are asked to note updates when notified.

If a school seeks to develop an entirely bespoke or novel policy it is important that the LGB checks whether such a policy statement is already agreed centrally.

20. Meetings with Regional Directors – Termly ‘T’ meetings

There are three ‘T’ meetings over the course of the academic year between the Headteacher (and senior leadership team as appropriate) and the Regional Director; these meetings serve an accountability purpose, focusing on review of progress against key priorities across education standards, people, money and the school’s wider contribution. The Chair (or Vice Chair) is expected to attend each of these. The agenda for T meetings is determined by the Education Director and circulated in advance to all parties. The minutes from a T meeting must be tabled at the next LGB meeting.

Members of the LGB are encouraged to attend other meetings between the central team and the school, for example: review and support visits, GRID (‘getting ready for inspection’) days, safeguarding visits.

21. Headteacher’s performance management

Responsibility for the line management of the Head sits with the Regional Director. However, the LGB Chair is always invited to contribute to the performance development review (PDR) process, in line with the United Learning PDR policy ([here](#)). PDR meetings are generally held at the end of the Summer term (primary academies) or start of the Autumn term (secondary academies and independent schools), to review the Headteacher’s performance over the previous year and agree performance objectives for the forthcoming year.

22. Inspections and the LGB

Quality of governance forms part of both the Ofsted and the ISI inspection frameworks. For inspection purposes, the legal position is that the UCST Chair is the proprietor/chair of governors for the independent schools and the ULT Chair is the proprietor/chair for the academies. However, United Learning Education Directors/Regional Directors (who support schools through inspections) ensure that inspectors understand the shared nature of governance within the Group.

Both Ofsted and ISI inspectors will want to meet governors during the inspection; both will also generally talk to Trustees. The governor toolkit provides ‘crib sheets’ regarding Ofsted and ISI for governors [here](#).

The inspection frameworks for both Ofsted and ISI are regularly reviewed. The current framework for Ofsted can be found [here](#), and for ISI [here](#).

23. Reporting responsibilities



Schools should publish details of their local governing body on the school website. The website should also have a clear link to the scheme of delegation.

Schools have a responsibility to report their LGB work to the centre. This is done by uploading information via the Education Information Portal (“EIP”) regarding: membership of the LGB, pecuniary and business interests of members, meeting schedule, governing body attendance registers and LGB agendas, minutes and meeting papers. Updating the EIP ensures that school websites remain accurate. Guidance on the EIP is available on the United Hub [here](#).

The DfE also publishes requirements for what academies must publish on their website ([here](#)). Compliance with these requirements is monitored by the central team, but governors should also assure themselves that they are being met.

24. Removal of LGB members

Governors can be removed from serving for the following reasons:

- Failure to adhere to the agreed codes of conduct
- Acting in a way that is contrary to the LGB’s ethos
- Bringing, or being likely to bring, the school, the LGB or their role into disrepute
- Refusal of a request to complete a DBS
- Missing two successive meetings (or failing to visit the school at least once in a period of six months)
- Any change to personal circumstances that would result in disqualification from standing as a governor
- Being disqualified from standing as a governor because of being subject to a section 128 directive
- Undermining fundamental British values or the LGB’s commitment or ability to deliver on its Prevent duty

LGBs may suspend membership – and should take action to do so swiftly – where it is considered that any of the above may apply. Chairs are advised to seek immediate support and advice from the Head of Local Governance in all instances whenever there are considerations of suspension or removal of membership.

25. Succession planning

LGBs should review membership regularly and plan for recruitment, particularly in respect of the Chair. Where necessary, planning for the recruitment of a new chair will be agreed between the school, the Regional Director and the Head of Local Governance.

26. Training for governors

As part of induction and continuous development, effective LGBs encourage everyone involved in governance, especially those new to their role, to make the most of the resources, guidance and training available to develop their knowledge and skills.

United Learning has determined a mandatory core of training:

- Induction to governance – all governors (provided by the Local Governance Team)
- Safeguarding (to include Keeping Children Safe in Education (KCSIE) updates) – all governors
- Prevent duty – all governors
- Cyber security – all governors
- Safer recruitment – at least two LGB members including the chair (and any governors who participate in school recruitment processes)
- Pupil Disciplinary Committee training – all academy governors who review an exclusion decision
- Managing Complaints – any governor involved in complaints management

Nominated governors may wish to pursue additional training to strengthen their effectiveness in, for example, SEND, early years or health and safety. LGB chairs may request bespoke training to strengthen practice from the Head of Local Governance.

A range of online training has been developed by the Head of Local Governance and a termly schedule of webinars is circulated at the beginning of each term. Webinar and training materials are now available on the Governance training page of the United Hub.

The Chair, in consultation with members of the LGB, is responsible for determining the training needs of the LGB (including for governors with specific responsibilities) and encouraging members to attend relevant training. LGB clerks should ensure that accurate training records are maintained.

In addition to United Learning training, The Confederation of School Trusts (CST) and the National governance Association (NGA) have a wide range of training materials available online. There are also commercially available training packages from companies such as 'The Key' and 'School Bus'. Schools can also buy into local authority training for governors, although this is generally more relevant to maintained school governance.

For further support please contact the team on Governancelead@unitedlearning.org.uk.

27. Evaluating the effectiveness of your LGB/CGB

LGBs should carry out an annual review of their effectiveness, led by the Chair. This is best completed during the summer term. The Local Governance team provides a set of guided questions to support this process which are circulated to chairs and LGB clerks. These questions are refreshed each year. The outcome of this annual review is reported to the centre electronically using the FORMs link provided.

The Head of Local Governance reports the outcome of LGB evaluations to Trustees, to support the Group Board's oversight of the effectiveness of the local tier of governance.

28. LGB Resources

The local governance pages within the United Learning Hub contain a wide variety of model documents to provide support and guidance for the work of LGBs. The toolkit is a working resource bank, and new items will be added as they are developed within our schools. A link to the toolkit can be found on the Local Governance hub-page [here](#).



For further support and guidance please contact:

- The Governance Team: governancelead@unitedlearning.org.uk
- The Company Secretary: Alison.Hussain@unitedlearning.org.uk

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