

Recognising your governance professional

A guide for those chairing governing boards in schools and trusts

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National Governance Association

The National Governance Association (NGA) is the membership organisation for governors, trustees and clerks of state schools in England.

We are an independent, not-for-profit charity that aims to improve the educational standards and wellbeing of young people by increasing the effectiveness of governing boards and promoting high standards. We are expert leaders in school and trust governance, providing information, advice and guidance, professional development and e-learning.

We represent the views of governors, trustees and clerks at a national level and work closely with, and lobby, UK government and educational bodies.

Introduction

Governance professionals are paid to provide administrative and advisory support to governing boards. They make an invaluable contribution to board efficiency, effectiveness, productivity and compliance. They also have a crucial role in promoting the culture that ensures good governance in schools and trusts.

Since 2013, NGA has run a [Clerking Matters campaign](#) to raise the status and profile and improve the pay, conditions and CPD of all types of governance professionals. Our report, [School and trust governance professionals: 2021 and beyond](#) highlights the role of governing boards in achieving this.

Baroness Berridge, Parliamentary Under Secretary of State for the School System, responded to our 2021 report and emphasised the importance of boards understanding and supporting the work of their governance professional. You can [watch Baroness Berridge's video message here](#).

This guide is aimed primarily at those who chair governing boards in schools and trusts. It describes four important ways that chairs can provide governance professionals with appropriate recognition and support by investing in the working relationship and holding purposeful professional conversations.

Terminology

This guide refers to:

Governance professionals – to describe the person providing formal clerking support to governing boards in maintained schools and academy trusts. The governance professional is the ‘constitutional conscience’ of the governing board. They provide advice on governance, constitutional and procedural matters. They also offer administrative support to the governing board and relay information on legal requirements.

Governing boards – to cover both the maintained governing body, the academy board of trustees and academy level committees.

Understanding the role in your context

There are three main ways of employing a governance professional:

- Some local authorities and trusts provide governance professional services.
- Some governing boards employ an independent service provider as their governance professional.
- Some governing boards appoint a governance professional who is employed as a member of staff (eg school administrator) in the school or trust. In some trusts these are supervised by a governance manager/lead governance professional.

Each approach has advantages and disadvantages. However, regardless of how they are recruited, governance professionals are often undervalued because their role is not well understood or sufficiently utilised by the governing board; some boards use their governance professional only to undertake the basic administrative duties and not as professional advisers.

It is important to acknowledge that governance professionals demonstrate different levels of skills, experience and knowledge depending on the type of board(s) they are supporting; requirements will differ depending on the setting. For example, governance professionals supporting academy trust boards advise on [schemes of delegation](#) and may also carry out Company Secretary duties.

Make time for a strategic discussion to seek input from your governance professional and executive leader, referring to the [DfE Clerking Competency Framework](#) to:

- Evaluate the governance support requirements of your board.
- Evaluate the extent to which they are being met through the design of your governance professional's role and the way it is utilised.

Not only will this increase awareness and understanding amongst the board, it will also help to clarify minimum expectations.

NGA's Clerking Matters campaign

The [Clerking Matters campaign](#) was established in 2013 with the following aims:

- to increase the understanding of the importance of the work of clerks and what can be expected of a well-trained clerk
- to help governing boards find good clerks where there is difficulty in doing this
- to help clerks know where continuing professional development can be found
- to encourage appropriate remuneration of clerks

You can read more about the campaign and its initiatives on the [NGA website](#).

Recognition and support

Understanding the role in your board's context provides a foundation for giving your governance professional the recognition and support they deserve. It is also the basis on which chairs can initiate the following activities.

1. Provide an appropriate job description and title

However they are recruited, the governance professional needs a clear understanding of what is expected of them. NGA's [model role descriptions](#) can be used and adapted for governance professionals employed by schools or trusts and as a point of reference when reviewing service level agreements with service providers. NGA advises that governance professionals employed in other roles at the same school should have a separate contract/service agreement and job description, which covers their governance professional role.

The job description/service level agreement should be reviewed prior to the governing board recruiting a governance professional, following any significant change to the board or governance structure and on a routine basis thereafter. This will ensure that it remains fit for purpose and accurately reflects the role being undertaken. Annual appraisals (see below) are another opportunity to assess how the job description and title fit the current role.

The same principle applies to the job title, although this is more relevant to those employing governance professionals in schools and trusts. The job title should reflect the specific requirements, level of responsibility and accountability attached to the type and size of their school/trust's governance structure. Whilst 'clerk to the governing board' is an accurate job title for some, 'governance manager', for example, may be more appropriate where the role includes broader responsibilities.

2. Carry out an annual appraisal

As with other professional roles, it is imperative that governance professionals are appraised annually. A proper development and appraisal system should be a two-way process that gives both the appraiser and governance professional an opportunity to reflect on the previous year and look forward to the coming year. The appraisal should identify both what has gone well and areas for improvement. Once the latter have been identified, relevant support and CPD can be offered.

We recommend that the appraiser is the governance professional's direct line manager (the chair in many cases). Note that for governance professionals employed in another role in school where, for example, their day-to-day line manager is the headteacher, the direct line manager for their governance professional role is the chair of the governing board.

Where the governance professional is a service provider, then the annual appraisal may take a different form which reflects the client – provider relationship. However, the principle is broadly the same: a discussion of positive aspects, areas for development and any issues to

resolve. The appraisal meeting is an honest conversation between governance professional and appraiser. We recommend that you use an [appraisal form](#) to ensure a robust appraisal process.

3. Ensure that pay is commensurate with the role

You will need to carefully consider rates of pay for your governance professional role at the appointment stage. The appraisal process should also include a conversation about the pay and remuneration they receive.

The conversation should consider the requirements of the role (ie whether they have changed significantly) and the level of service that is being provided. Crucially it should also include an assessment of the number of hours the governance professional is spending on their duties in relation to the pay and remuneration that they receive. The conversation should inform pay progression commensurate with the level of service and professional expertise involved.

Whilst there is no standard pay equation to refer to, governing boards can use local advice (such as from the local authority and local school networks) as well as the following to inform the evaluation of what their governance professional should be paid:

- The [Clerking Competency Framework](#)
- NGA's research report [Putting a price on effective clerking](#) which provides a basic benchmark against the role description for a governance professional at a single school.
- [National Association of School and College Clerks](#) Pay and Conditions report, which recommends rates of pay for qualified and unqualified clerks.

4. Support induction and CPD

Chairs are well placed to invest in their governance professional's development at an early stage by ensuring they receive an effective induction that provides a clear understanding of what their role is. In practice, this does not mean making extensive arrangements yourself, but checking that the right connections have been made with the local authority, trust, local networks and service providers as appropriate so that the governance professional has access to an induction programme which:

- Supports them to become fully effective as quickly as possible.
- Helps them to become familiar with the governance context.
- Signposts to further professional development and support opportunities.

Induction programmes vary depending on the context but are likely to provide:

- Key information to the new governance professional such as membership details and contact information.
- Introductory meetings with key people in and outside of the organisation.

As chair, you are also an integral part of the governance professional's induction – your induction meeting(s) with a new governance professional are important in the process and provide an opportunity to:

- Introduce the new governance professional to the governance structure of the school or trust (responsibilities, accountabilities, delegation, reporting).
- Share the mission, values and ethos of the school/trust.
- Agree engagement routines: how often you meet, how you remain in touch.
- Talk about how procedures and specific scenarios work in practice.

Supporting and facilitating the ongoing CPD of your governance professional is also important. Use routine conversations and annual appraisals to discuss development needs, how they might be met, the time and cost of such activities as:

- Attending courses, briefings, networks and conferences both locally and nationally. NGA offer a [Level 3 Certificate in the Clerking of School and Academy Governing Boards](#).
- Shadowing opportunities that build knowledge and skills (eg shadowing governance professionals in or outside the school sector).
- Peer support and networking.
- Broader career development including accessing advice about progression.

You can also demonstrate that you take your governance professional's CPD seriously by including them in conversations about board development priorities.

NGA resources for chairs

The NGA Knowledge Centre contains guidance, information, model policies and more. You can find a number of [resources designed to support chairs](#) of governing boards. Popular resources include our [Time management tips for chairs](#) and [practical advice on co-chairing](#).

Thank you for reading this guide. If you have any feedback you'd like to share, please email kcfeedback@nga.org.uk.

More from NGA

Knowledge Centre: best practice guidance

NGA members get exclusive online access to best practice school governance guidance from NGA's Knowledge Centre. Go to [NGA's Knowledge Centre](#) and log in to browse and download guidance, templates, model policies, information summaries and more.

GOLDline: bespoke advice

NGA's [GOLDline advice service](#) provides independent and timely advice to governing boards with GOLD membership. Our advisers guide members through topics including governance roles and responsibilities, admissions, exclusions, complaints, and board constitution.

Find out more about [NGA GOLD membership](#) and sign up.

Don't miss out on membership benefits

If you're an NGA member, check your account details are correct by logging in at nga.org.uk and visiting the account management page. Every member of your governing board needs an up-to-date account to access benefits including our Governing Matters magazine and weekly e-newsletter. If you don't have an account or you're not sure, talk to your clerk or chair or [contact us](#).

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