

Finding your next chair

A succession planning guide
for governing boards in schools
and trusts

September 2022



Introduction

Welcome to this updated guide to succession planning, jointly developed by the National Governance Association (NGA), Governors for Schools and Inspiring Governance.

Succession planning is about ensuring continuity within an organisation by having the right people in the right place at the right time. For governing boards, this means recruiting new board members and encouraging learning and development.

When succession planning works, it creates the conditions for strong chairs to move on to another school or trust after a reasonable time. This contributes to strengthening governance throughout the system and to the success of schools and trusts.

Yet when a chair steps down, there are sometimes no potential successors, and an unprepared board member is compelled to take the role on. This presents risks to:

- board effectiveness – caused by reduced leadership capacity
- compliance – because leadership and governance requirements are uncoordinated
- board dynamics and culture – instability affects behaviours and operating routines
- morale and relationships – that may be undermined by uncertainty
- reputation – loss of stakeholder confidence in leadership and management

This guide is intended to support governing boards in all types of school structure to reduce these risks by making succession planning part of their long-term practice and accessing appropriate support.

We hope that you find this guide useful and that it supports meaningful discussions about recruiting and developing the future chairs of governing boards.



Emma Knights OBE
Chief Executive
National Governance Association



Dominic Judge
Director of Governance Programmes
Director of Education and Employers



Hannah Stolton
CEO
Governors for Schools



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Visible Governance in schools

NGA's Visible Governance campaign seeks to shine a light on the impact of good governance in schools and trusts across the country.

We are encouraging governors, trustees and governance professionals to be bold and positive about sharing what they do and why they do it, highlighting their contribution to the education system and the difference they make to children and young people in their communities.

Visit the [Visible Governance campaign page](#) to find out more.

n gla National Governance Association

Highlighting the role of governors and trustees

NGA are proud to present a short, animated film designed to highlight school and trust governance. The film can help you to share your board's work and support your recruitment and succession planning.



Watch our film and find out how to use it

Visible Governance
in schools

Recruiting with succession planning in mind.

Resources to support your board

Governors for Schools have produced a short video which will advise you on the things to consider when recruiting new governors and trustees. This will help you consider how your board looks to the future with a clear vision, to ensure effective leadership.



GOVERNORS FOR SCHOOLS

View the video and other resources

<https://governorsforschools.org.uk/recruitment-resources-for-schools/>

1 About the role of chair

The governing board works as a collective, with the chair as its leader. It is the chair's leadership that helps to achieve successful teamwork and a competent board. Broadly speaking, the chair's role is the same on all governing boards. It involves:

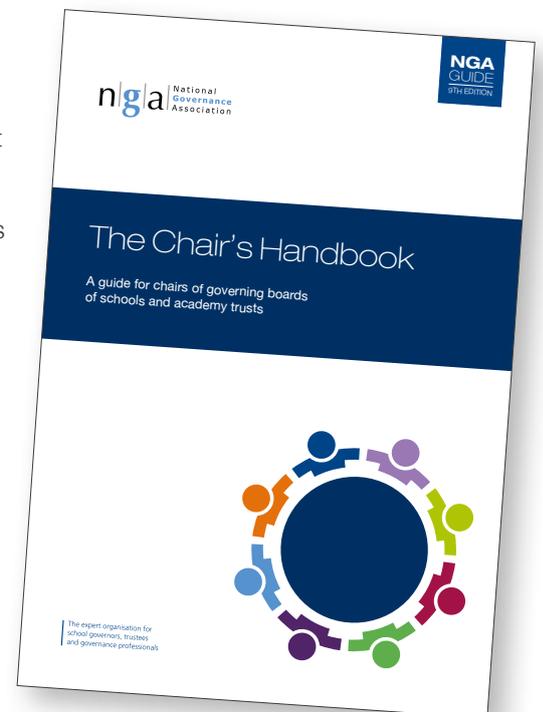
- leading the governing board with support from the vice chair
- developing the team of governors/trustees
- chairing meetings
- working with the governance professional (clerk to the board) to coordinate business
- being a role model for good governance, including support and challenge
- maintaining a strategic focus and a healthy culture
- developing a working relationship with school and trust leaders, and acting as a sounding board for the lead executive
- being visible to stakeholders and representing the board in certain situations

Where the chair is governing in a group of schools, as part of a federation or multi academy trust (MAT), they must also understand how governance duties and responsibilities are delegated within the organisation.

The time commitment involved

While it varies significantly, chairing undoubtedly presents an additional time commitment, especially for [chairs of trust boards](#) who can spend up to 50 days per year carrying out their governance duties. However, this guide aims to show that with the right planning and collaboration, it is possible to reduce the amount of time it takes to chair and as a result, make succession planning easier.

The [Chair's Handbook](#) comprehensively describes the components of the chair's role, provides an invaluable aide to performing the role of chair effectively and includes a [model role description](#).



2 Electing or appointing a chair

Whenever a vacancy arises for the chair, the governing board must elect a new chair at their next meeting. In academy trusts, the articles of association will state how the chair is appointed. This is usually by election, but it can also include appointment, particularly in the case of academy committees (often termed local governing bodies).

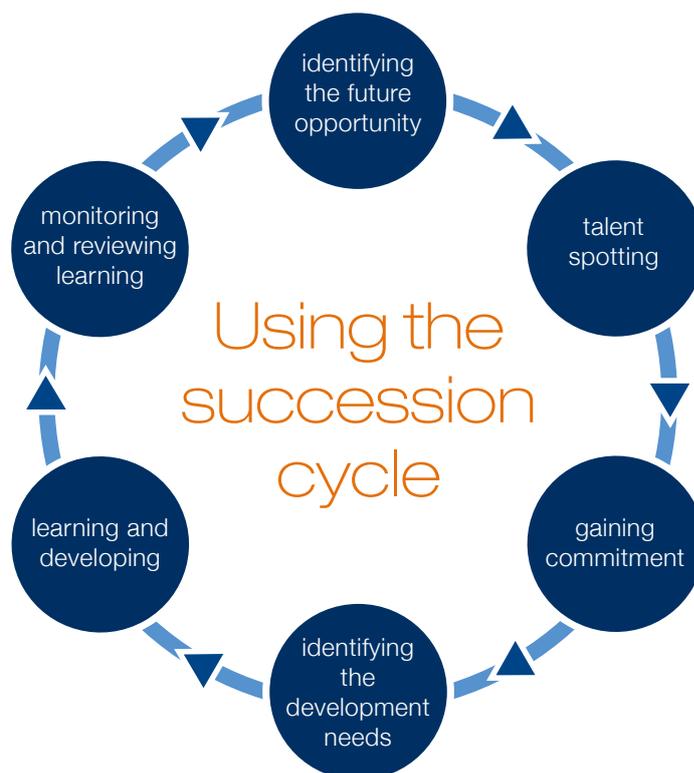
Your governance professional will support the board to follow the correct process, keeping in mind the following:

1. Employees of a maintained school or academy trust are not eligible to chair the governing board/trust board. Where the school or academy has a religious character, the formal governing documents sometimes require the chair to be one of the foundation governors (appointed by the charitable or foundation body), to ensure that the religious character is upheld. However, this is not always the case – seek clarity from your governance professional.
2. The focus should be on appointing/electing chairs and vice chairs with the skills for the role; not just the willingness to serve.
3. It is good practice for the board to evaluate the chair's current performance before re-electing them. NGA offers a [chair's 360° review service](#).
4. It is possible to appoint more than one person to [share the role of chair or vice chair](#) if the board believes this is necessary and in the best interests of the organisation.
5. NGA recommends that the chair is elected annually at the first board meeting of the academic year and that their period of office should not significantly exceed one year. An annual election is an opportunity to reflect on and discuss the current and future leadership of the governing board. This is particularly important in cases where the chair has served for a number of years (see 7 below).
6. The governance professional organises and supports the election process that has been determined by the board. This includes requesting nominations and counting votes.
7. While there will be times when continuity is seen as important, the appointment or election of a chair should never be a forgone conclusion, because an individual is viewed as unassailable in their position, or because there is seemingly no alternative.
8. To allow the opportunity for a fresh start, NGA recommends that no one serves as chair in one school or trust for more than six consecutive years.

3 Using the succession cycle

Succession planning has a cyclical nature and is more effective when it is reviewed regularly and scheduled into the annual work plan of meeting agendas to ensure that it does not become a reaction to a vacancy occurring. It is led by the current chair or even a board member with [special responsibility](#) for coordinating succession planning activity.

Stage	What it looks like
Identifying the future opportunity	The chair openly discusses their intention to step down and the board starts planning succession.
Talent spotting	Identifying current and potential governors/trustees with the confidence and capacity to take on the role immediately or within 12 months.
Gaining commitment	Gaining the commitment of individuals to take on the role when the current chair steps down.
Identifying the development needs	Identifying the CPD needs of individuals, and the board collectively, to support succession planning.
Learning and developing	Skills and knowledge are increased through training, e-learning and other CPD.
Monitoring and reviewing learning	Learning is shared (to increase capacity) through board, committee, or one-to-one meetings.



4 Succession planning activities that work

The following activities can be adapted to fit the circumstances of your governing board. They are not sequential and can be deployed throughout the succession planning cycle.

Conversations

The current chair should be talking to both individual board members and the board collectively, almost from the point they are elected or appointed, about:

- identifying their successor
- the timescale for succession

Having these conversations allows the chair to be open about their plans for letting go of their position and the willingness and capacity of others to take it on. It is also an opportunity for board members to state their intentions and aspirations for the future. Succession conversations lead to:

- talent being identified (not just on the board but in the community)
- potential candidates emerging and being prepared to put themselves forward
- potential barriers being confronted (such as lack of confidence, lack of encouragement and current ways of working)
- a realisation that the board needs to plan to recruit its next chair (if there is no solution within the current membership)
- the possibility of co-chairs being identified

What to cover in conversations about succession

Misconceptions about the role

It could be that the current chair is viewed as indispensable or that the role can only be undertaken by older people from a certain background.

What's involved

Breaking down the role can help to alleviate concerns about it being unachievable alongside other commitments. This is an opportunity for the chair to model good practice and demonstrate that the role can be performed effectively with a reasonable time commitment. See [time management tips for chairs](#).

What might be putting people off

Individuals may feel uncomfortable if they perceive the board as challenging to lead or see potential issues working with leaders in the school or trust. There might be a presumption that a certain person will be the successor, based on length of service for example, even if they might not want to be or are not well suited to the role.

Certain individuals may need to be asked to consider the possibility well before the incumbent chair steps down. It is important to give future chairs confidence that this is a role they can carry out successfully and to nurture their interest by exploring opportunities such as:

Peer support and networking

New and future chairs benefit enormously from having access to an experienced chair whom they can engage with in a mentoring capacity, talk through issues, working relationships and aspects of the role. A mentoring relationship can be brokered in a number of ways, such as through the governance support team in a MAT, local authority governor services or a local governance association.

Local associations are independent, volunteer-led organisations which provide a forum for governors and trustees in their local area. Local association events are generally considered to be excellent for networking and developing professional relationships.

Many MATs establish routine meetings and networking between their trust board and academy committee chairs.

[NGA's Leading Governance Development for Chairs programme](#) provides chairs and future chairs opportunities for peer networking, developing leadership skills and confident governance.

NGA networks provide opportunities for those involved with the [governance of MATs](#), those interested in special educational needs and disability ([SEND](#)) issues and [young governors](#). In addition, NGA runs regular [leadership forums](#) providing chairs, aspiring chairs and executive leaders with an opportunity to discuss the governance challenges and opportunities facing their setting.

Increasing your options through recruitment

Recruiting new volunteers is not always an easy task and recruiting from underrepresented groups can be particularly challenging. However, there are many steps boards can take to meet their recruitment needs. This is explained in NGA's guide to getting [the right people around the table](#).

Both [Governors for Schools](#) and [Inspiring Governance](#) can help you recruit volunteers to increase diversity on your board. When registering your vacancy, you'll be able to specify the skills and experience you need. They can recommend people who may have prior governance experience or have experience as a chair in other sectors.

Targeting the recruitment of your next chair

When filling a vacancy that arises on the board, consider how you might target the recruitment of your next or future chair. For example, by particularly welcoming nominations or applications from individuals with experience of chairing meetings or leading a team and who are interested in chairing committees and being part of the succession plan.

Talent spotting

Talent spot among existing board members who may feel able or confident enough to take on a chairing role, new volunteers who join and may have future potential or more widely among parents and other stakeholders and encourage them to join the governing board. In a MAT this could result in potential trustees being spotted among the membership of academy committees or retaining experienced local governance chairs by supporting them to move from one academy committee to another.

Engaging stakeholders

Engaging with stakeholders, and especially parents and the wider community, helps ensure that a governing

board remains visible and accountable. It can also shine a light on future governing talent that exists outside the board's immediate environment. There are many examples of boards capitalising on the relationship their schools and trusts have developed with, among others, their local council, agencies, local businesses, neighbourhood forums and faith groups to recruit governors and trustees. Many of whom have gone on to serve as the chair.

Increasing your options through team building

A strong governing team increases leadership capacity and therefore the options for succession.

Creating a team environment

Boards work best as a team striving together towards a common purpose. Potential chairs are more likely to be encouraged to come forward when they are part of an environment in which individuals share the workload, are respectful of different personalities and perspectives, and celebrate success together. Another important aspect of this is adapting board practices to ensure full participation. For more on this, read NGA guides to [team working](#) and [what governing boards and school leaders should expect from each other](#).

One of the most important aspects of being a chair is working in partnership with the executive leader (headteacher or CEO), who can offer support, challenge and act as a sounding board. However, it is important that the working relationship and rapport which exists between the chair and executive leader is not perceived as being so close or exclusive that it becomes a barrier to those who would consider putting themselves forward as the chair.

Working with your governance professional

Reviewing the role of your governance professional and ensuring that it allows for maximum support and advice will bring confidence and encouragement to potential candidates for the chair's role. For more on this, see NGA's [guide to recognising your governance professional](#).

Identifying strengths and areas for development

Boards that routinely evaluate their strengths and areas for development are more likely to increase their capacity and continuously improve. The Governance Handbook advises boards to [evaluate themselves](#) on a routine basis; succession planning should be considered as part of this. [Auditing the skills](#) and [diversity](#) of the board will also help to identify potential chairs.

Prioritising board CPD

This starts by providing [a comprehensive induction](#), then remaining proactive, responding to the results of the skills audit and highlighting relevant opportunities.

Developing leadership skills

[NGA's Governance Leadership Forums](#) provide chairs, aspiring chairs and executive leaders with an opportunity to discuss the governance challenges and opportunities facing their setting. The meetings focus on peer support with guest speakers sharing experiences from their school or trust.

Leading Governance development for chairs

[NGA's Leading Governance leadership development programme](#) provides chairs, vice chairs, committee chairs and future chairs opportunities for developing leadership skills and confident governance. The programme offers a blend of flexible learning and takes approximately three terms to complete.



“I think all boards should have an induction plan in place including a buddy system, otherwise it is difficult to recruit and retain a diverse set of governors.”

A volunteer recently placed by
Governors for Schools

5 Sharing leadership to support succession

There are many ways in which sharing the burden of leadership responsibilities with a vice chair and or co-chair and more widely between the governing board can benefit succession planning in the long term. These include:

- reinforcing that governance accountability is not assigned solely to the chair
- demonstrating that the role is manageable
- building the experience and confidence of board members
- reducing the risk of disruption if the chair unexpectedly leaves mid term
- creating a succession planning mindset

Co-chairing

It is possible to share the role of chair and this may prove to be a useful option, especially where individuals have the necessary skills but not the time. Not only can this make the role practical; it can also strengthen the leadership of the board by having another person's valued judgment to draw on.

[Read NGA's guide to making a co-chairing arrangement work.](#)

Raising the profile of the vice chair

Ideally, the election of vice chair should form part of a succession plan, with the individual viewing it as an apprenticeship for the role of chair. As a minimum, the chair should seek to develop a strong relationship with the vice chair, use them as a sounding board and provide meaningful responsibility that builds confidence. This could include the vice chair:

- being the first point of contact for complaints directed to the board under an adopted procedure
- coordinating the induction of new board members
- evaluating skills audits and identifying board development needs

[Read NGA's guide to the role of vice chair.](#)

Creating a team of leaders

Create the conditions for a team of leaders (and potential successors) to emerge by:

Encouraging members of the board to volunteer to be co-chair, vice chair or chairs of committees, growing their contribution and profile as a board leader.

Providing shadowing and mentoring opportunities from an experienced chair from another board to prepare an individual to take on the role of chair.

Establishing a buddy/mentor system for new governors/trustees.

Providing opportunities to observe and participate in chairing activities, such as meetings with school and trust leaders or external bodies.

Leading a particular initiative or working group.



6 Accessing support

There is a range of support that governing boards can access to help them recruit and build an effective team, develop a succession plan and identify their next chair.

Support to carry out the role

The governance professional

Not only are governance professionals invaluable when it comes to ensuring board efficiency, effectiveness, productivity and compliance, they also provide wise counsel to chairs as they get to grips with the role.

Central support teams

The support teams that exist within trusts, local authorities and external traded services typically provide routine governance advice, support with issue resolution and hold regular briefing sessions.

Independent governance advice

Advice can be accessed through sources such as the [NGA GOLDline](#) service.

Team building and succession planning

[Welcome to Governance Live](#): free virtual sessions that are exclusively available to NGA GOLD members and MAT trustee members. They complement the induction of new governors and trustees and are focused on helping them to make an impact in their first six months.

[External reviews of governance](#) (ERGs) examine the board's culture, structure and practice based on the elements of effective governance outlined in the Department for Education (DfE) Governance Handbook. NGA has extensive experience of carrying out such reviews of governance in all types of school.

[Team building and succession planning workshops](#):

NGA delivers face-to-face and online workshops for governing boards on topics including improving board dynamics and relationships and preparing your board for the future. These two hour sessions are arranged to suit the governing board and are delivered by experienced NGA consultants.

Further reading

- [The Chair's Handbook](#): a valuable guide to chairing governing boards in schools and trusts
- [The right people around the table](#): a guide to recruiting governors and trustees
- [Increasing participation in school and trust governance](#): a state of the nation report on recruiting and retaining volunteers
- [Chairing a board: developing governance, sharing leadership](#) – an NGA policy report



Practical e-learning support to help governing boards develop and plan their future leadership

NGA Learning Link subscribers can access an e-learning module that sets out practical steps for preparing and reviewing a succession plan for chairing roles.

Find out more
www.nga.org.uk/learninglink

The module was developed in partnership with Inspiring Governance and helps learners to:

- understand the importance and principles of succession planning
- review the characteristics of good chairing
- reflect on barriers that might hinder succession planning
- develop a suitable structure for succession with their own board
- gain tools, strategies and knowledge to plan for the future of their board

The National Governance Association (NGA) is the membership organisation for governors, trustees and governance professionals 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 governance professionals at a national level and work closely with, and lobby, UK government and educational bodies.

www.nga.org.uk

Inspiring Governance is the DfE commissioned free online recruitment service, connecting schools and trusts in England with skilled local volunteers interested in becoming governors and trustees on school and academy boards.

You can recruit directly from your account, with the platform's technology allowing you to quickly search for volunteers based on skills, experience, and location.

Shortlist, invite and connect, to facilitate a conversation, with the thousands of skilled professionals who sign up for the service each year.

www.inspiringgovernance.org

Governors for Schools is a charity that finds, places, and supports skilled volunteers as governors and trustees on school and academy boards.

They operate across England and Wales, working closely with volunteers, schools, universities, public bodies and business partners to find suitable matches that produce excellent outcomes for young people.

Governors for Schools supports the volunteer through the recruitment process, and engages those from a wide demographic in order to help boards diversify. Volunteers have free access to a range of eLearning, webinars and the annual Governors for Schools CPD accredited digital conference.

www.governorsforschools.org.uk