NGA Board Self-evaluation
For administrators

General guidance

1. Welcome to the NGA Board Self-evaluation

The NGA Board Self-evaluation is an administratively light, economic and straightforward method of online self-evaluation, which enables the voices of all those involved in governance to be heard. The self-evaluation is offered via the NGA online platform.

There are three sets of questions for different boards:

- 20 questions for single school governing board
- 21 questions for multi academy trust board
- 16 questions for academy committee (local governing body, LGB)

Your school/trust will receive the relevant question set according to the type of board.

This general guidance is for all those involved in your board self-evaluation, so please read it through before you start. Once the administrator has invited people to complete the self-evaluation via the online platform, they will also receive this guidance with step-by-step instructions on completing the self-evaluation on the platform.

2. The purpose of self-evaluation

Self-evaluation is a fundamental feature of good governance and NGA recommends that governing boards evaluate themselves annually. Governing/trust boards who conduct self-evaluation and regularly review their impact are more likely to:

- deliver core functions in an effective, ethical and accountable way
- assure compliance
- continuously improve
- achieve improved outcomes for pupil

The purpose of the online board self-evaluation is to promote self-evaluation and ownership of any issues which are identified. By working with the NGA consultant, your board will benefit from the consultant's knowledge and experience, leading to a realistic analysis of the board's strengths and areas for development.

The findings from the self-evaluation will provide evidence of your board's and senior executive leaders' own perception of areas of strength and areas for development. This information can inform your governance action plan for the coming year or so, ensuring that you focus on the areas where most development is required, and if necessary, additional support commissioned.

So the outcome of the self-evaluation process should be a plan for more effective governance in your school or trust.

3. The NGA Board Self-evaluation package

Your self-evaluation package includes

- Access to the relevant question set via the NGA online platform
- This general guidance
- The step-by-step instructions on using the NGA online platform for the self-evaluation administrator and respondents
- Templates for report analysis and action plan
- A 60-minute telephone or video call mentoring session with an NGA consultant who will discuss your report and possible areas for development (excluding the LGB self-evaluation as an add-on to a trust board self-evaluation)

4. DfE guidance

The DfE guidance referred to throughout the questions includes:

- Academy trust governance guide (ATGG)
- Academy trust handbook (ATH)
- Trust quality descriptions
- School estate management standards
- Equality Act advice for schools

5. Administering the self-evaluation

When ordering the self-evaluation, an administrator is assigned by your school/trust to manage the self-evaluation. The administrator will receive two emails once your school/trust is set on the platform:

i.   A confirmation email from consultancy@nga.org.uk confirming your school/trust has been set on the platform. The NGA consultant who is assigned as your mentor will also be copied in the email.

ii. A welcome email from noreply@brilliantassessments.com for activating an account on the online platform.

Please note that as the platform generates automated emails, these may end up in junk folders. The administrator should notify everyone involved in advance, reminding them to check the junk box if they do not receive the invitation email.

The step-by-step instructions are in the Managing the self-evaluation platform as an administrator section.

6. Completing the self-evaluation

The self-evaluation statement should be commented honestly and realistically where possible, as these add valuable additional detail. However, be aware that although comments are unattributed, the content, style or tone may mean that they are identifiable.

7. Who should complete the self-evaluation

In order to give as complete a picture as possible, all those involved in governance in your school or trust should be invited to complete the self-evaluation. This should include your senior executive leaders and the governance professional. The maximum number you can invite is 20.

8. Following the completion of the self-evaluation

Once the self-evaluation report are generated, you should take time to consider the findings and the key areas to develop into a governance action plan. You should have received a Word document named *NGA Board Self-evaluation - report analysis and governance action plan* attached to the confirmation email to help you with these.

9. Your mentoring session

Your NGA consultant for the mentoring call is copied on the confirmation email. Please contact the mentor to schedule the call if there's a particular completion date you have planned for. The mentoring call is aimed to be completed in three months from the date the self-evaluation is set up. After that, the mentor will be released from the mentoring call booking. You can still access your online self-evaluation.

The mentoring session is excluded from an LGB self-evaluation as an add-on to the trust board self-evaluation. Please contact NGA if you would like to add a mentoring session to this option.

10. Enquiries

There is a Frequently asked questions and troubleshooting guide at the end of the document. If your questions/issues are not answered in the guide, please contact consultancy@nga.org.uk.

For questions about the mentoring call, please contact your mentor.

Managing the self-evaluation platform as an administrator

1. The NGA online platform

The NGA Board Self-evaluation is set up on the NGA online platform. This section will guide you in managing the online self-evaluation on the platform.

2. The role of the administrator

You are assigned by your school/trust to be the **administrator** of the self-evaluation. The administrator will be responsible for:

- contacting the respondents prior to the self-evaluation,
- adding the respondents to the platform, and
- receiving the reports when the self-evaluation is completed.

You will find guidance on who should be invited as respondents in <u>Section 6</u> of the general guidance.

3. Notifying the respondents before sending the invitations

The individuals invited to complete the self-evaluation are referred to as **respondents** on the platform. Once you have added the respondents and sent an invitation via the online platform, the respondents will receive an invitation that is auto-generated by the platform.

Please ensure that respondents have access to their mailboxes and are available to complete the self-evaluation according to your planned schedule, as the platform can only generate the report when all respondents have completed the self-evaluation.

You should notify the respondents before you send an invitation. As it is from your school email address, it will get to the respondents' email server, ensuring that all respondents are aware of the auto-email they will receive. Here is the key information the respondents should know:

- The auto-email will be sent from <u>noreply@brilliantassessments.com</u>,
- The date you are going to send the invitation via the online platform, and
- The deadline for completing the self-evaluation is 28 days from the date your school/trust is set up on the platform.
- The Privacy Policy <u>https://www.nga.org.uk/privacy-policy/training-and-consultancy-privacy-policy/</u> and <u>https://www.brilliantassessments.com/privacy-policy</u>.
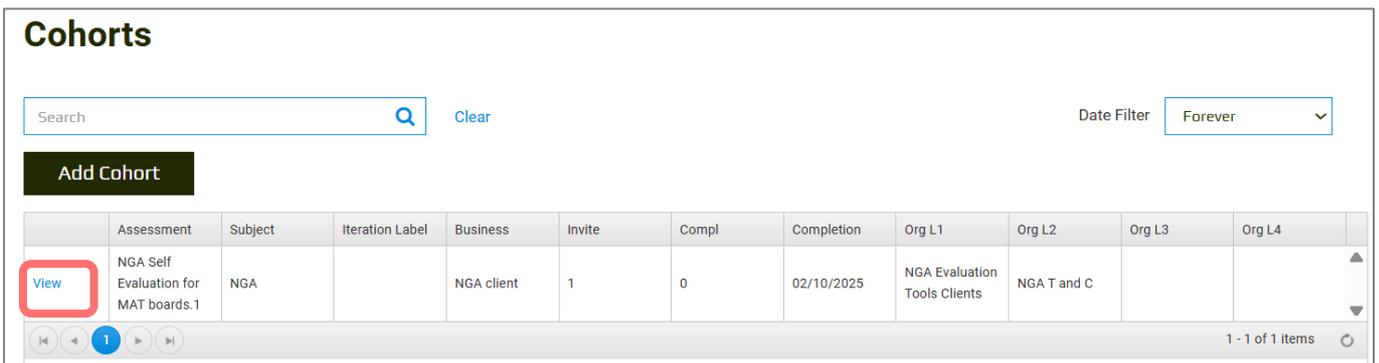
The invitation email includes the general guidance, the step-by-step instructions and a link to complete the self-evaluation. The link is unique and is for the particular respondents only.

4. Accessing the online platform

After creating a password and logging into the online platform, please save the page to your web browser and remember your password.

5. Adding the respondents

i.   After logging into the platform, you will see a cohort with you as the subject on the first page.

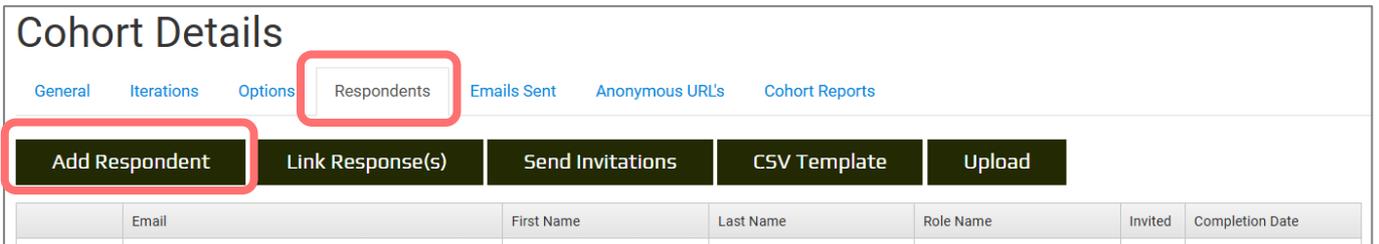ii.   Click "View" and you will see the details of the self-evaluation.

iii. Select the "Respondents" tab, and then click "Add Respondent", enter the respondents' email address, first and last names, select "Respondent" as the role, and then click "Save". Repeat the process to add all Respondents.
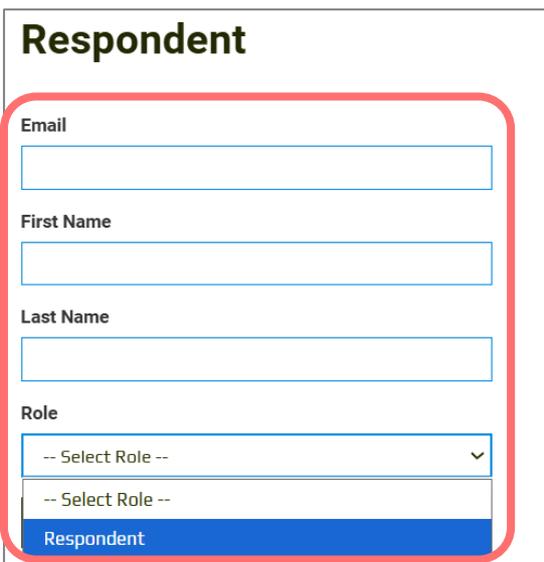
iv. Once you have added all the respondents, check if their email addresses and names are correct.

v. Click "Send Invitations", and a message will pop up stating that the invitations have been sent. You will also see the "Invited" column being updated to "Yes".
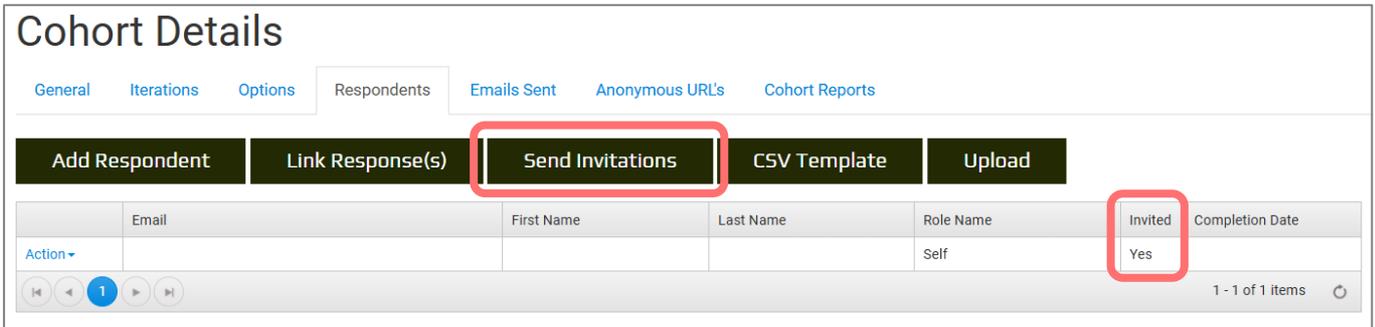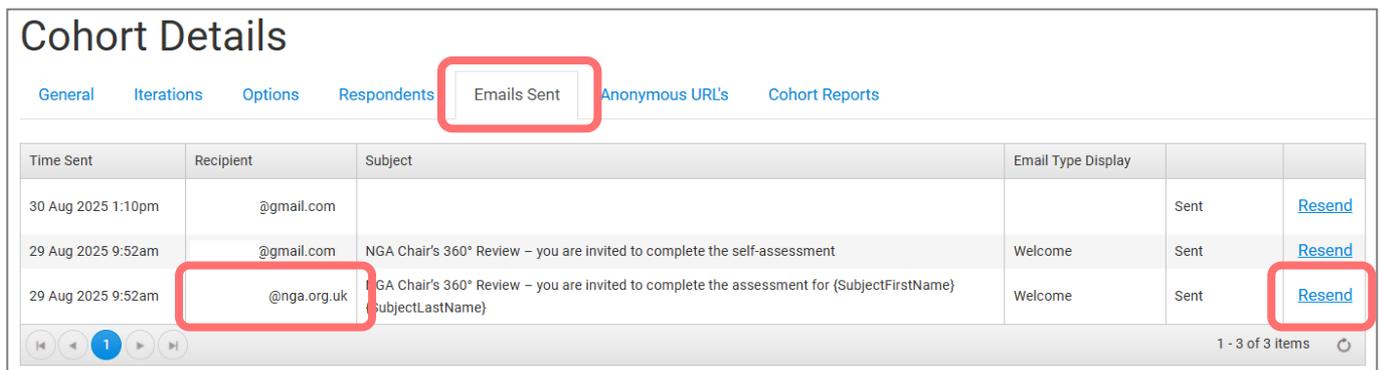

vi. The default completion date for the self-evaluation is 28 days from the date you are set up on the platform. The date is just a reference date for the platform to send a reminder. You can still access the self-evaluation after the date.

vii. The outstanding respondents will receive a reminder email 7 and 14 days after the invitation.

viii. The platform will collate the results for you automatically.

6. Resending the invitation to the respondents

If the respondents do not see the invitation email, please ask them to check their junk folder. If they still cannot find it in the junk folder, you can resend the invitation to them.

i. In the cohort page, go to the "Email Sent" tab, locate the respondent's email and then click "Resend".

7. Removing or editing the respondents

It is suggested to remove respondents if they are no longer available to complete the self-evaluation to prevent them from receiving auto-reminders.

i. In the cohort page, go to "Respondents", click "Action" of the respondent and then select "Remove from Cohort".

To edit an appraiser, for example, the email address, you will remove and re-add the appraiser.

8. Downloading the reports

i. On the cohort details page, select the "Cohort Reports" tab and then click "Run OnDemand".

ii. Check that your email address is correct, then click "Get PDF Report". You will then receive the report from noreply@brilliantassessments.com.

iii. If you don't receive the report after an hour, please check your junk folder.

9. The next step

After you receive the report, you can proceed to the next step of the self-evaluation process. Please refer to Section 7 of the general guidance for more information.

10. Enquiries

There is a Frequently asked questions guide in the next section. If your questions/issues are not answered in the guide, please contact consultancy@nga.org.uk.

Frequently asked questions

This section answers the frequently asked questions and provides solutions to frequent issues administrators and respondents encounter. If the issues persist after trying the suggested solutions, please contact consultancy@nga.org.uk.

1. **I lost the password to the platform.**
   Please visit https://assessments.nga.org.uk/Account/Logon and click "Reset your password" to reset your password.

2. **The platform doesn't allow me to add respondents.**
   The maximum number of respondents is 20. You cannot add additional respondents if you reach this number.

3. **I want to add more respondents.**
   The maximum number of respondents is 20. If you have not reached this number yet, you can follow the instructions in Adding the respondents to add more respondents.

4. **Respondents say they didn't receive the invitation email.**
   Please check if the respondent's email you entered into the online platform is correct. If yes, please ask the respondent to check the junk folder of their email inbox. The invitation email to respondents will be sent from noreply@brilliantassessments.com.

5. **Respondents say they have lost the link to the self-evaluation/guidance document.**
   The online platform will send a reminder with the link to outstanding appraisers 7 and 14 days after the invitation. It will be sent from noreply@brilliantassessments.com. Please ask the respondent to check the inbox or archived folder for the invitation email. If they still cannot find the invitation email, please follow the instructions in Resending the invitation to the respondents to resend it.

6. **Respondents say the self-evaluation does not open properly.**
   Please invite respondents to try opening the self-evaluation using a different web browser or device. The self-evaluation can also be completed on a smartphone or tablet.

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7. I need more time to complete the whole self-evaluation process.

Although the mentor will be released from the mentoring call booking three months from the date the self-evaluation is set up, you can still access your online self-evaluation. Please check with the mentor for their availability if you need more time for the self-evaluation process or want to postpone the mentoring call. You will find the mentor's contact information in the confirmation email sent from consultancy@nga.org.uk.

Completing the self-evaluation as a respondent

This section contains step-by-step instructions for respondents completing the self-evaluation. It is included in this document for administrators' reference. Respondents will receive general guidance and these instructions when they receive the invitation from noreply@brilliantassessments.com.

1. The NGA online platform

You are invited by the administrator, as a **respondent**, to complete the online self-evaluation. The **administrator** is assigned by your school/trust to manage the self-evaluation.

Please save the invitation email, as you will need it for guidance and step-by-step instructions, as well as the link to the online self-evaluation. The link to the self-evaluation in the invitation email is unique for you only. Please do not share it with the others, as they will have their own unique links.

It takes around 30 minutes to complete the self-evaluation. However, you are not required to complete the self-evaluation in one attempt. You can save your progress and continue to complete it by clicking the same link in the invitation email.

2. Accessing the online self-evaluation

   i.   Click the link in the invitation email from noreply@brilliantassessments.com, and the self-evaluation page will open on your web browser.

   ii.   Click "Next" at the bottom right of the page.

iii. Rate each of the statements and provide comments as appropriate.

Please assess NGA MAT (standalone) on the following areas:

1. Governance culture - The board is a committed team that works well with the trust's executive leader and the governance professional.

| Strongly Agree | Agree | Neither agree or disagree | Disagree | Strongly Disagree | N/A |

1. Governance culture - Comments

| B | I | U | ☰ | ☰ |

iv. You can save your progress and return to the self-evaluation to continue with the link in the invitation email. Click "Save Progress" at the top right-hand corner.

☐ **Board culture and practice** 17% | **Unanswered** | **Save Progress** ☐

v. The self-evaluation is divided into different sections. Once you have completed a section, click "Next" to move to the next section until you have completed all the sections.

5. Induction and ongoing development - There is a quality induction programme in place for new trustees and a culture of ongoing governance training and development.

| Strongly Agree | Agree | Neither agree or disagree | Disagree | Strongly Disagree | N/A |

5. Induction and ongoing development - Comments

| B | I | U | ☰ | ☰ |

< Previous   Next >

vi. Click "Finish" to submit the self-evaluation.
Remarks: different question sets will have different numbers of statements. The question set your school/trust using may not necessarily have the same total number of statements in this guidance document.

vii. Once you have submitted the self-evaluation, your part is completed, and the administrator will continue to the next step of the process.

3. Enquiries

If you have any questions about the self-evaluation, please contact the administrator assigned by your school/trust.