

Welcome – summarise purpose of session and slides will be circulated About me – Chair local academy committee, member of MAT providing alternative provision. Previous role as a governance officer for a 25 school MAT.

# **Overview**

- About us
- Updates to website and membership
- What's free incl. skills audit, job site
- NGA Learning Link free trial
- Annual Governance Survey
- Learning from External Reviews of Governance
- NGA Manifesto
- Upcoming Events

# About us



NGA is the national membership association for governors, trustees and governance professionals in England's state schools and trusts.

We empower those in school and trust governance with valuable resources, expert support and e-learning. Together, we're raising standards to ensure every pupil can thrive today – and tomorrow.

#### nga.org.uk

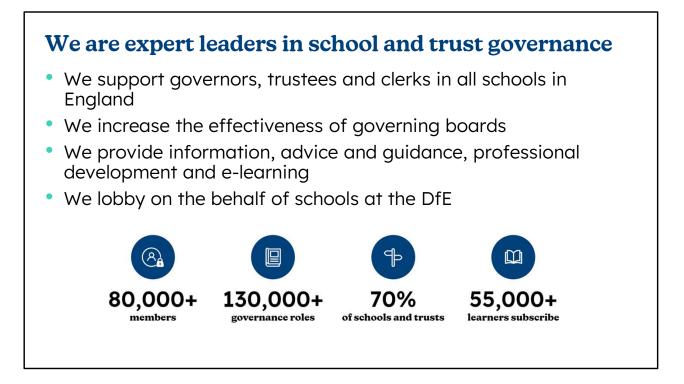
Some of you will be familiar with NGA and for some it may be the first time you have heard of the charity. NGA was set up in 2006, from two governor associations joining together.

We support governors, trustees and clerks in all state schools in England. Our mission is to improve the educational standards and wellbeing of young people by increasing the effectiveness of governing boards and promoting high

- standards. Wellbeing has to be the key and safeguarding is all of our responsibility.
- a) NGA is funded by membership subscriptions and so is independent
- b) NGA is the only national organisation focused on school governance and as such is the first port of call for government and other policy makers
- c) NGA is heavily referenced in the DfE's Governance Handbook



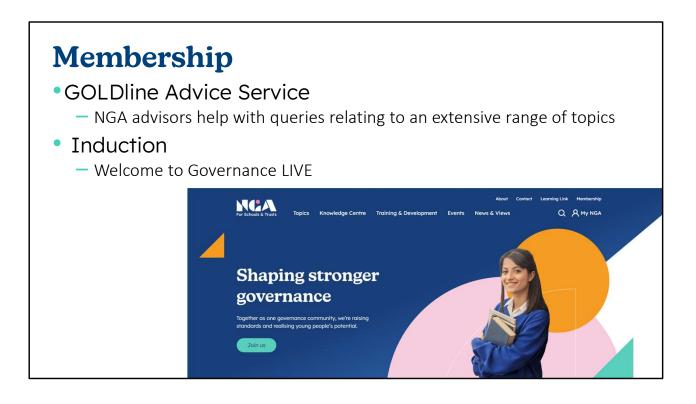
This slide gives an overview of our services and I just wanted to highlight that all of our <u>webinars</u>, <u>blogs</u> and research are free to access.



NGA has over 80,000 members (70% of schools and trusts) We use your feedback to represent and lobby on the behalf of schools.



- One Governing in a MAT Handbook per new trustee Published October 2023
- One Chair's Handbook per trust chair and local chair Handbook-September 2022
- One Welcome to Governance one per new local governor October
  2023 14<sup>th</sup> edition
- <u>£16 each or £8 for members. NGA MAT members</u>: all academy committee (local governing body) members who are new to governance also receive a free copy of this guide.
- Governing Matters quarterly
- Weekly email briefing education updates and resources to support governance
- To receive your free copy, <u>update your communication preferences</u> (tick 'I am new to governance') and <u>ensure your address is up to date.</u>



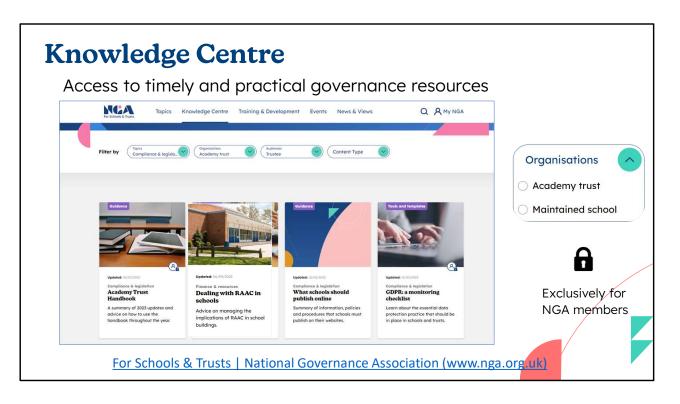
Staffed 9 – 5 Monday to Friday

Governance Live - Virtual induction sessions at least once a term – not recorded so discusson enabled

Maintained school governors 30 January 2024 16:00 – 17:15

Local academy governors 31 January 2024 16:00 – 17:15 Trustees Trustees 7 February 2024 16:00 – 17:15 Click Events on the washing line One-hour session will explore:

- what to expect positives and real-life challenges
- top tips and support available
- how to make an impact quickly
- the type of school or trust you want yours to be and how to help achieve that vision



Second drop down select whether you are an academy trust or a maintained school

Free resources mentioned here – dealing with RAAC (interestingly many schools in Essex impacted) and What schools should publish online.

NGA guidance is designed to support you and covers:

- the specific responsibilities that boards have
- why it matters
- who the board works with
- how the board fulfils its role in practice
- informed by our conversations with you
- relevant to your school/trust setting
- accessible (ready to pick up and use)

Topics will also show relevant Learning Link training, blogs, articles etc

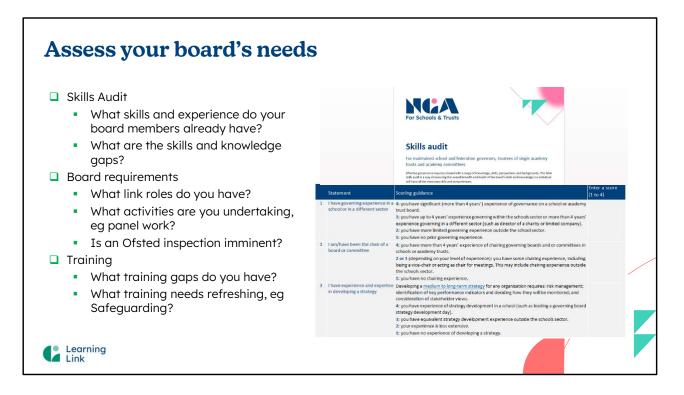
Symbol for members only

Topics – often searched for items

News and views – GM, Blogs, Newsletter – Campaign – Governor Workload Search

NGA Knowledge Centre holds lots of resources that includes guidance, planners, templates, tools and checklists. If you've not had chance to spend much time on the new NGA website that we launched in the summer, I just wanted to highlight a few features that you and the boards you support might find useful. So you can see on the right hand side there a view of the Knowledge Centre and just underneath the blue banner at the top are some dropdown filters. You can see where I've zoomed in on those on the left hand side of the screen, this gives our members the ability to find the resources that are relevant to them, both in terms of their setting, their roll and also the topic they're interested in. Moving on now...

You can see on the right hand side there a view of the Knowledge Centre and just under that blue banner, you'll find a few drop down filters (that are actually in use across the website)



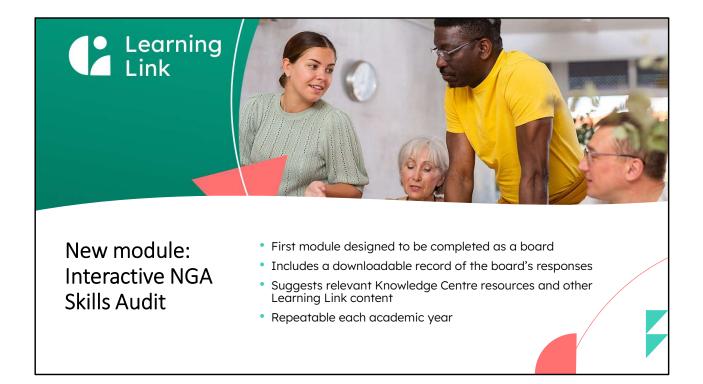
Any items mentioned in the DfE Governance Handbook remain free such as the skills audit. We develop templates as we know they really do make the job of governance that little bit easier.



- Designed for busy governors, trustees and governance professionals
- Written by experts and cover all the essentials for an effective governing team
- Available when you need it to learn at your own time and pace
- Learning Link is time-saving and affordable

Safeguarding course is compliant with the requirements set out in KCSiE 2023.

NONE £198 GOLD £99 STANDARD £139



## Coming soon...

#### • Safer Recruitment – November

- Discover what safer recruitment is and how it applies to the education sector
- Identify how governors can contribute to safer recruitment and how they can apply the recruitment process in their settings
- Understand how to maintain a safer culture in schools

#### • Greener Governance - November

- A broad overview of environmental sustainability
- Why this matters to schools and trusts
- How governors can begin to take action

#### • Introduction to Chairing – Spring 2024

- How to run a meeting
- The legal requirements of the role
- How to build good relationships

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# **Governance Professionals Jobs**

A free service for schools and trusts to advertise and recruit clerks and governance professionals



https://nga.org.uk/governance-professional-jobs/



# For Schools & Trusts

Nina Sharma and Megan Tate

Annual governance survey 2023

## Annual Governance Survey 2023: Navigating challenges and shaping the future

School and Trust Annual Governance Survey 2023 | National Governance Association (nga.org.uk)

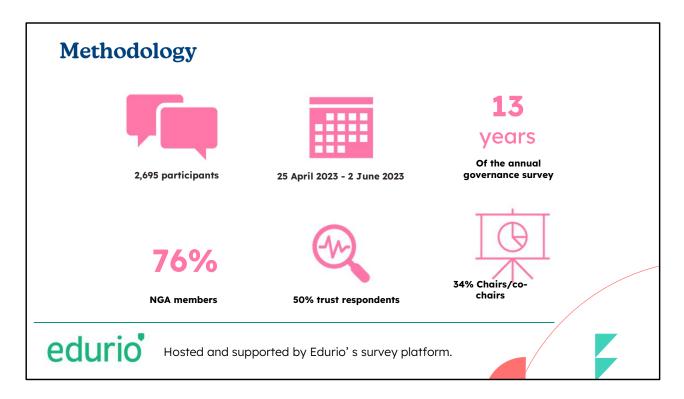
nga.org.uk



- 1. Challenges and priorities
- 2. The governance role
- 3. Finance
- 4. Staffing
- 5. Pupil success & wellbeing
- 6. Stakeholder engagement
- 7. School campus
- 8. Ofsted
- 9. Special educational needs and disabilities
- 10. MAT governance
- 11. Government performance



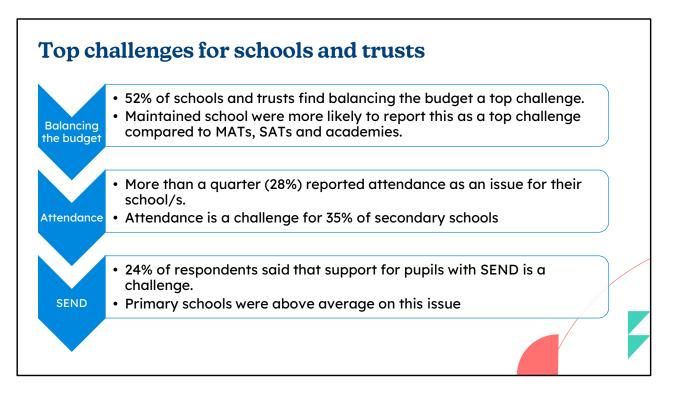
As you can see we covered many topics this year, and I am going to touch on a few of these in more detail this evening



- Over 2.5k respondents,, the majority of respondents (91%) were aged 40 or over. The survey is in its 13<sup>th</sup> year and taken in May before RAAC surveys
- Certain questions in the annual survey appear every other year. This is so that we can explore these topics longitudinally whilst also leaving room for more in detail questions on other topical issues to keep the survey relevant to current affairs.
- Yorkshire and Humber region had 252 respondents. Mostly from maintained school governors (45%) which compares to 50% AGS

A single academy trust board 11% AGS 7% Y & H A multi academy trust board 24% AGS 28% Y & H A local governing body/academy committee or equivalent 15% AGS 20% Y & H

AGS = Annual Governance Survey



3 top challenges: Budget, attendance and SEND, Just focusing on budget as I will come on later to SEND and attendance.

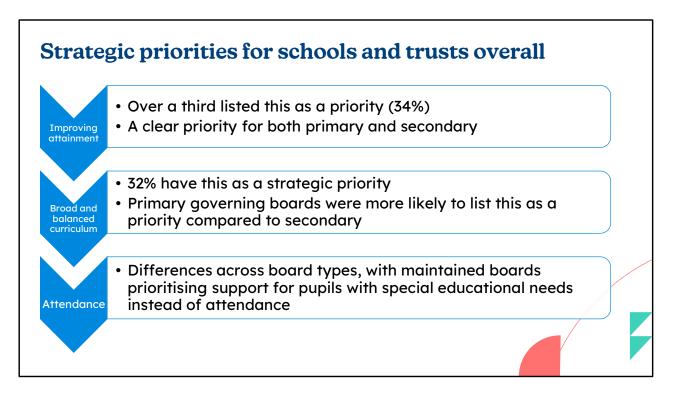
- Around 9 out of 10 schools in Y&H have been negatively impacted by the increase in energy costs on their school.

There is a mixed picture when considering the medium to long term (3-5 years) position of schools and trusts the region:

- 14% of schools/ trusts stated they were financially sustainable with current levels of funding and income.

- Slightly under half (44%) are financially sustainable with efficiency savings and drawing on unspent funds.

- Just under a third (32%) of schools/ trusts stated that they were financially unsustainable without significant changes.



Strategic priorities: improving attainment. Curriculum and attendance. Let's look at these challenges and priorities by school phase

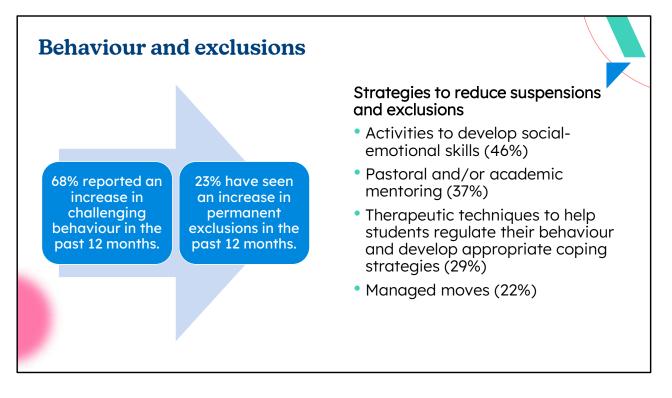
PRIMARIES						
Challenges		Strategic priorities				
	Balancing budget		Improving attainment			
E S	SEND		Broad & balanced curriculum			
¥ ¥ ¥ ¥	Attendance	>>>> >>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Attendance	/		

Top 3 challenges in primaries. The SEND issues highlighted include:

- Funding (66%)
- Obtaining EHCPs (58%),
- 53% cited challenges engaging support,
- 25% cited appointment or skills of SENCO/support staff
- over 22% of respondents parental engagement as a challenge

	SECO	NDARIES	
Challenges		Strategic priorities	
	Balancing budget	Attendance	
>>>> >>>>	Attendance	Improving attainment	
°70	Behaviour and exclusions	Behaviour and exclusions	

In Secondaries we see that behaviour and exclusions come into the top 3 challenges

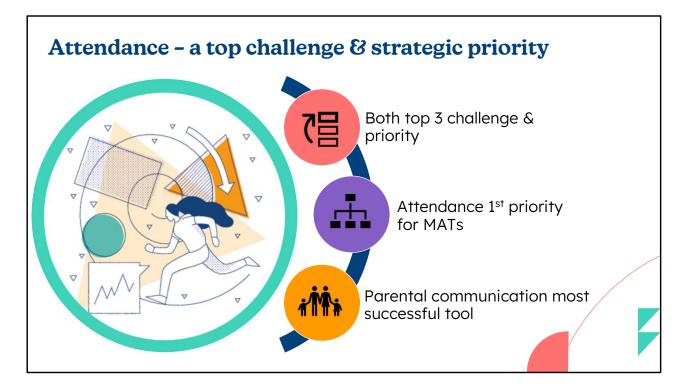


Challenging behaviour within the Y&H region has increased with over half (59%) of governors and trustees reporting that their school/ trust has seen an increase in challenging behaviour in the past 12 months.

However, unlike the national picture survey respondents in this region stated that there had not been an increase in the number of exclusions in the past 12 months. 23% increase reported elsewhere which is a real tribute to the work here.

SPECIAL				
Challenges		Strategic priorities		
Bal	ancing budget	>>> >>>>	Attendance	
	ff wellbeing uding workload		Staff wellbeing including workload	
Dev reto	veloping and aining staff	-21	Support for pupils with special educational needs	

Staff wellbeing including workload comes into the top 3 together with developing and supporting staff. When we go on to discuss the NGA manifesto you will hear about our key asks for staff.



Attendance as a top challenge:

– Primary (27%) Secondary (35%)

- Maintained (25%) MAT (32%)

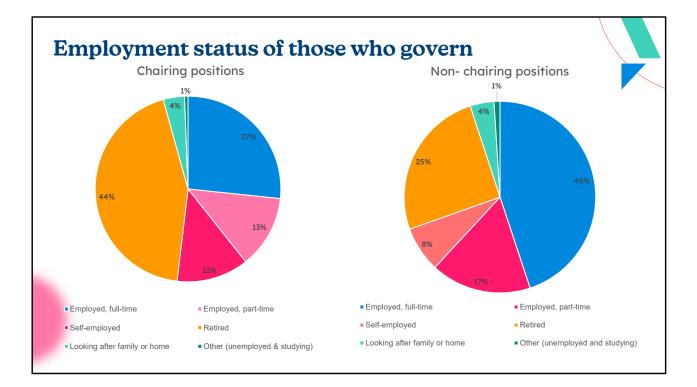
Working with parents has been found the best way to improve attendance. Rewarding attendance and the disadvantaged – thoughts?



Over three quarters (79%) of respondents from Yorkshire and Humber feel that governor/ trustee recruitment is a challenge. This was above the average of 77% of respondents reporting challenges to recruitment. Y & H was the third most likely region to report challenges in governor/ trustee.



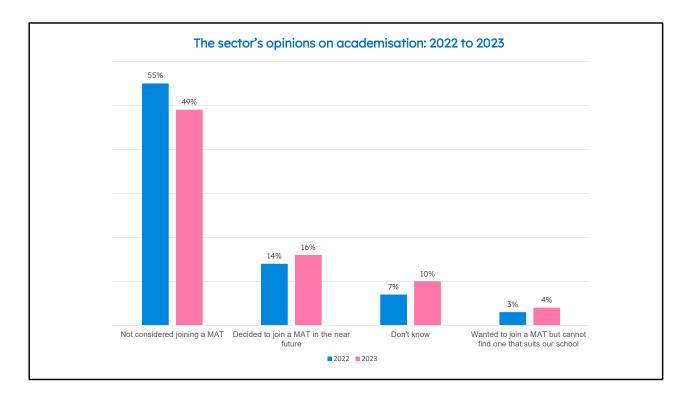
- 40% think governance role should be paid
- Less than 1/3 volunteers getting paid time off to conduct their governance duties
- 26% of governors surveyed are considering resigning A quarter (25%) in Y&H respondents
- Need more young people on governing bodies



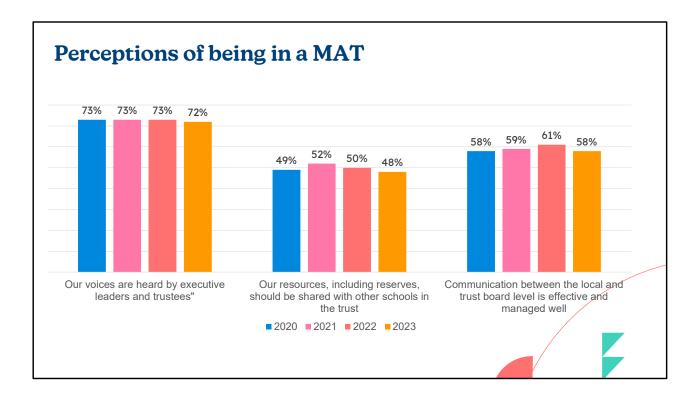
The majority of Chairs (44%) are retired and this is due to the experience and time needed to undertake the role.



Free recruitment resources for governors. Trustees is a paid service.



Increase in those that are considering joining a MAT which is not surprising given the white paper Opportunity for all 2022; and the current direction of the regional directors

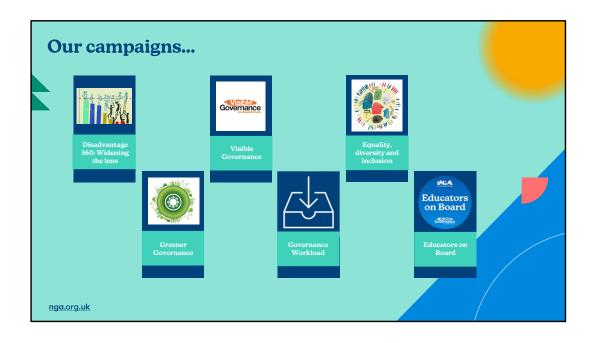


# 18. Perceptions of being in a MAT

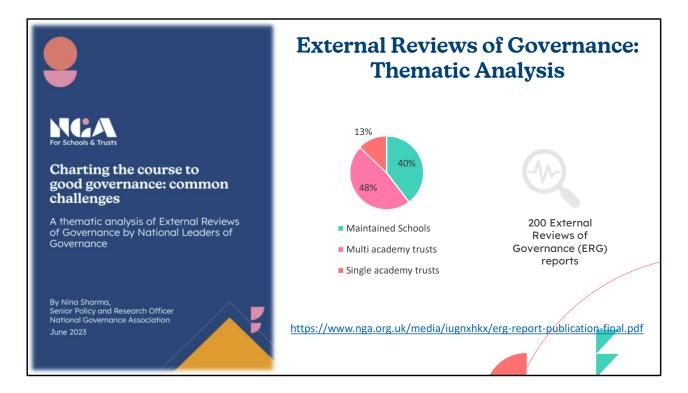
We asked local governors about their experiences of governing within a MAT

- 72% of those governing at a local level said their voice is heard by trustees and executive leaders, this remains consistent to recent years

Over half (58%) feel that communication between the local tier and the trust board is effective and well managed, however -→ this is a reversal of the upward trend demonstrated in the last few years.



**Governance workload:** The sustainability of a voluntary role. Looking at the extent of the workload concerns for those who govern and to identify key factors that contribute. As we know, unrealistic demands hinder recruitment efforts and lead to the burnout and departure of experienced volunteers. Report due to be published on 17 November and will be highlighted in the NGA annual address.



The research explored 200 reviews. 5 key focal points of the reviews:

- Governance structures and practices:
- Vision and strategy setting;
- Executive Accountability;
- Financial Oversight;
- Governance Support and Development.



1. Weaknesses in board composition, skills, or turnover were reported in nearly one-third of governance reviews.

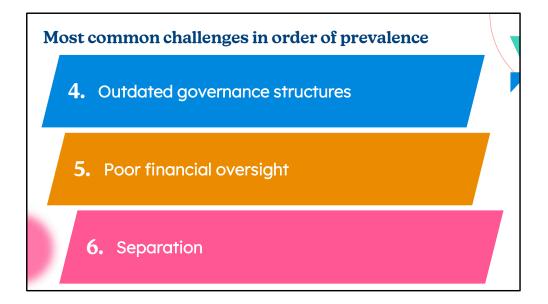
- A lack of recruitment planning meant the rate of individuals leaving governance was increasing faster than vacancies could be filled.
- Lack of targeted/skills led recruitment strategies
- Lack of succession planning led to examples where long-standing or unwilling chairs continued their roles with less motivation and commitment due to a perceived lack of alternatives. Where a new chair was needed, individuals sometimes assumed the role without adequate preparation.

#### 2. Scrutiny, Focus, and Accountability

- A third of all boards and a quarter of MAT board reviews analysed, reported trustees were not effectively holding the CEO to account. (40% maintained, 33% Sats)
- Some ERGs highlighted a lack of any monitoring undertaken by governors or trustees outside of meetings,
- Some board meetings did not allow enough time for questioning and scrutiny, while other reviews indicated an overreliance on a few experienced governors,
- Some examples of good practice NLGs highlighted; the governance professional providing new governors and trustees examples of generic, and topic focussed questions to pose at appropriate times to build confidence,

#### 3. Vision and Strategic Planning

- Over a third of boards either lacked a clearly defined vision or had one which did not include long-term considerations, making their future aspirations unclear.
- Governors and trustees had not been involved in the creation of the existing vision or its review, and therefore did not have a sense of ownership and were not monitoring how the strategy would bring about that aspiration.



**4. Outdated Structures** Outdated or over complex schemes of delegation sometimes led to role duplication, frustration, and unclear accountability This was particularly identified where trusts had grown rapidly or maintained schools transitioned to single academy trust (SAT) status. Many reviews found that the governance model did not meet the legal requirements outlined in the Academy Trust Handbook.

## 5. Financial Oversight

- One-fifth of NLG reviews found oversight of finances problematic.
- Boards lacked skilled governors and trustees with financial expertise
  Additionally, monitoring the impact of targeted funding streams such as pupil
  premium revealed some inconsistent practices, leaving uncertainty that the mo

premium revealed some inconsistent practices, leaving uncertainty that the money was supporting vulnerable groups effectively.

## 6. Separation

- Some boards felt having a member serving on multiple layers of the governance structure facilitated better communication and did not see the risk of 'group think' or potential conflicts.
- Evidence showed that some boards had appointed members for more than one role to overcome issues with fulfilling vacancies.
- Whilst some boards felt that to have a degree of overlap between members and trustees, and trustees and the local tier was helpful in enabling each tier of governance to be updated and facilitated communication. It is NGA and the DfE's view that the most robust governance structures have a significant degree of separation between the individuals who are members and those who are trustees, and those who are trustees and serve on local committees.
- The use of regular planned communication mechanisms between the trust board and the local tier is crucial to ensuring that the local tier feels valued, and stakeholders' voices are heard.



7. **Board dynamics** – Healthy challenge. Negative where board dynamics and relationships between the board and executive leaders negatively affected decision-making. Factors like workload sharing and differing understandings of roles and purposes This theme emerged more frequently where structures and schemes of delegation had not evolved or were not clear.

8. **Training and development** - Effective development doesn't always need to come from formal training, NLGs witnessed learning from peer networks facilitated by Local Authorities, MATs and informal school and trust locality groupings, as well as noting the impact of an outward facing board who took an interest in how things are done elsewhere to transform their own induction with 'buddying'.

9. Governance Professionals - The analysis emphasised the crucial role of governance professionals in advising boards on matters of compliance and supporting with their expert knowledge and experience. Some of the reviews identified instances where the governance professional or clerk was the personal assistant to the headteacher or CEO or the business lead in the school or trust. Where this was the case, the reviews highlighted the importance for the board to consider mitigations against any potential conflicts of interest or lack of independence such as having a planned and communicated course of action in this event.

**10. Risk Management** - effective identification of risk did not always lead to boards monitoring mitigations more closely or providing as effective financial oversight as was needed.



nga.org.uk

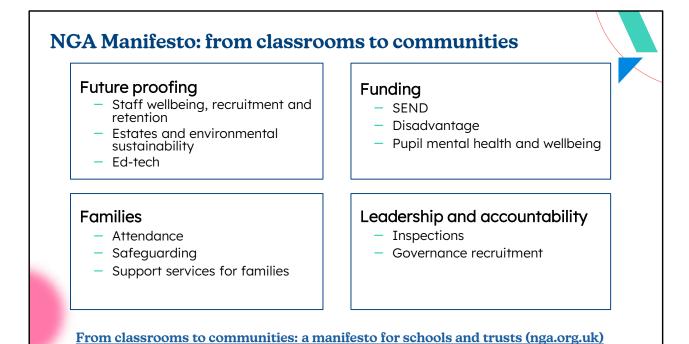
# From classrooms to communities: a manifesto for schools and trusts

2024 general election

## The King's Speech 2023 – 7 November 2023

the introduction of the Advanced British Standard that will bring technical and academic routes into a single qualification" and plans to "reduce the number of young people studying pool quality university degrees and increase the number of undertaking high quality apprenticeships".

While no specific Bills were announced, the Government has previously committed to publishing a White Paper next year on plans for an Advanced British Standard. Given the scale of such a change and limited time before a General Election must be called, it is unlikely any legislation will be tabled



NGA's manifesto highlights the importance of governance, sustainability, technology, and family engagement in our education system. It is a clear call to action for the government to actively implement these proposals, ensuring they meet the needs of all young people and communities. **Attendance:** Attendance remains a significant challenge in the education sector. The manifesto acknowledges the government's efforts to address this issue but emphasises the importance of engaging with families and communities to improve attendance rates. Effective communication and advice to parents are highlighted as successful methods for enhancing attendance.

**Safeguarding:** The manifesto acknowledges a concerning rise in safeguarding concerns, including bullying, cyberbullying, neglect, and domestic abuse, with 71% of respondents reporting an increase in 2022 and 55% in 2023. NGA calls for the restoration of funding for children's early intervention support, emphasising the unsustainable pressure on schools.

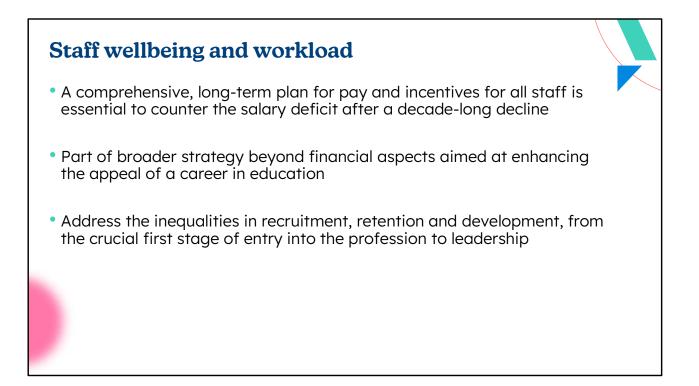
**Support Services for Families:** As schools increasingly provide additional services, NGA calls for a review of expectations and resources, advocating for the Family Hub model's continued rollout to provide holistic support for young children and their families.

**Funding:** The manifesto stresses the need for funding to address both the sustainability of highquality education and the additional needs of vulnerable groups.

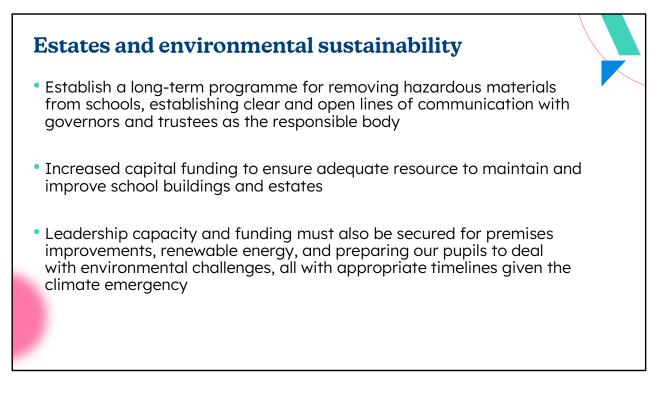
**SEND (Special Educational Needs and Disabilities):** NGA calls for the urgent implementation of the 2022 SEND green paper, funding reform, an audit of special school places, and a consistent approach to training.

**Disadvantage:** The manifesto highlights the widening disadvantage gap due to the COVID-19 pandemic and calls for the protection of the pupil premium's value and the extension of FSM eligibility to all pupils receiving Universal Credit.

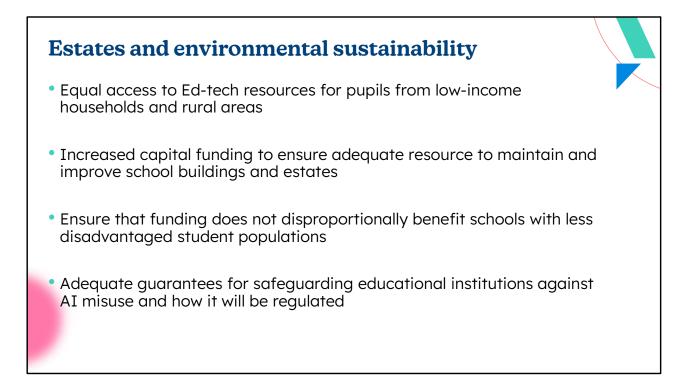
**Pupil Mental Health and Wellbeing:** NGA emphasises the increasing need for mental health support in schools and urges the government to prioritise the provision of such support and access to specialist services.



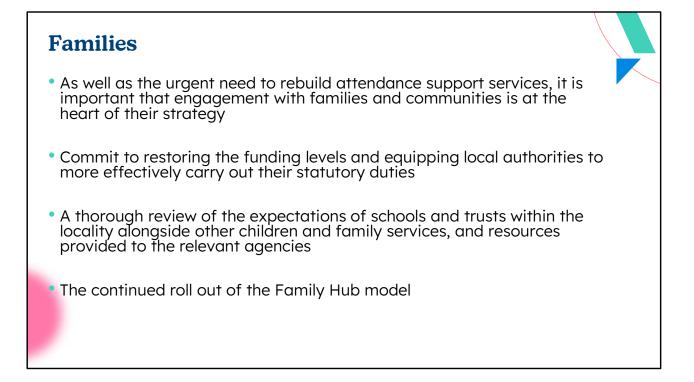
**Staff Wellbeing and Recruitment:** The manifesto highlights the persistent challenges of recruitment and retention in the education sector. It calls for a comprehensive, long-term plan for pay and incentives for all staff to address the salary deficit and promote careers in education. Furthermore, the manifesto stresses the importance of improving diversity within the workforce.



**Estates and Environmental Sustainability:** NGA emphasises the need for a long-term program to remove hazardous materials from schools and invest in school estates. Modernising energy provision in schools is also a top priority, given the substantial contribution of schools to UK public sector building emissions. Leadership capacity and funding access are identified as crucial barriers to progress.



**Ed Tech:** The manifesto underlines the significance of equal access to Edtech resources for all students, regardless of their economic background or geographical location. It calls on the government to ensure that funding is distributed equitably and emphasises the importance of safeguarding educational institutions against potential misuse of AI in education.



**Support Services for Families:** As schools increasingly provide additional services, NGA calls for a review of expectations and resources, advocating for the Family Hub model's continued rollout to provide holistic support for young children and their families.

## Funding

- The 2022 SEND green paper to be followed through urgently alongside funding reform
- An audit of sufficiency of special school places and a consistent approach to training
- FSM eligibility should be extended to all those pupils in receipt of Universal Credit
- The NFF must be reviewed to ensure that as well as all schools receiving sufficient funding to sustain high quality education, they can meet the additional needs of vulnerable groups
- The provision of mental health support for young people throughout all schools and access to specialist services

Access to funding was the biggest challenge for boards in Y&H in relation to pupils with SEND followed by obtaining an EHC plan and engagement with local authority/ support services (59%). Just over half (51%) of Y&H respondents reported an increase in safeguarding concerns over the past 12 months, 46% reported that safeguarding concerns had remained broadly the same and only 2% shared that safeguarding concerns had remained broadly the past 12 months.

Domestic abuse, neglect and bullying and cyberbullying were the top three concerns that boards reporting their school(s) had seen an increase in over the past 12 months.

## Leadership and accountability

- A fully independent, expert and transparent review of school inspection and how inspections affect schools in disadvantaged communities
- Replace the current grading system with a more constructive alternative that helps schools to improve
- Greater recognition to be given to the role and responsibilities of governing boards in the inspection process
- Ofsted's capacity and expertise needs to be developed so it can inspect MATs as a single organisation
- Invest in a volunteer recruitment campaign to ensure citizens know that that this is an opportunity available to them to contribute to their communities

**Leadership and Accountability:** The manifesto welcomes changes in inspections but expresses concerns about their impact on school leaders and staff. NGA calls for an independent, expert, and transparent review of the inspection process and greater recognition of the role of governing boards. Additionally, it calls for a recruitment campaign to address the governance recruitment crisis.

A fully independent, expert and transparent review of school inspection and how inspections affect schools in disadvantaged communities

Replace the current grading system with a more constructive alternative that helps schools to improve

Greater recognition to be given to the role and responsibilities of governing boards in the inspection process

# Ofsted

- Despite increase in scrutiny of Ofsted's role, views on inspections remain diverse
- majority (60%) support graded school inspection system
- 34% hold an opposing view
- School type and phase has no significant impact
- Staff governors most likely to oppose graded inspections 58%



**Ofsted's capacity and expertise needs to be developed so it can inspect MATs as a single organisation.** Current inquiry into how well Ofsted is fulfilling its role by the cross-party Education Committee – launched July 2023. NGA provided evidence. Has the framework helped to improve school standards and teacher workload., looking at complaints procedure too – committee will make recommendations. In October NGA Sam Henson met with the committee and outlined how we had seen a decline in governance being mentioned in Ofsted reports. Amanda Spielman gave evidence on 8 Nov.

## Our voice so far

- Party conferences
  - Successfully disseminated
  - Handed to Bridgit Phillipson and meeting agreed in principle
- Media
  - Published by TES
  - Opinion piece for TES on the manifesto by the co-chief executives
- Comms
  - News piece
  - Newsletter
  - GM magazine article

#### School governors call for long-term plan for staff pay | Tes

Disseminate the manifesto to all MPs and partners

Arrange meetings with main political parties

Call to action for members contact MPs directly re. key asks

We're calling on our stakeholders to write to their MP to amplify the voice of the governance sector and the schools, trusts and communities they represent.

You could send your MP a copy of the manifesto or write to them about the specific challenges and concerns impacting your school or trust.

You can find out who your MP is and how to contact them by visiting the Parliament's website: <u>www.members.parliament.uk/members/commons</u>

16 November	4.30 - 6.00pm	Annual Seminar 4: the purpose of education and the role schools play in changing the world	Zoom
17 November	11 am start	Annual Address and AGM	Zoom
28 November	4.30 - 5.30pm	Young Governors Network	Zoom
06 December	12.30 – 1.15pm	Webinar: What makes schools and trusts financially efficient?	Zoom
27 February	4.30 - 6.00pm	SEND Network - members only	Zoom

•11:00am - 12:15pm Annual Address from NGA's co-chief executives and Q&A chaired by Lynn Howard, NGA's chair of trustees

•12:30pm AGM – thanks for casting your vote, much appreciated

All free events apart from SEND Network

# Any Questions?

# Thank you for all that you do

Katherine Soanes Regional Lead katherine.soanes@nga.org.uk



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