

A guide to virtual governance: meetings, monitoring and induction

For those governing within schools and academy trusts

Updated 6 January 2021





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.

www.nga.org.uk

To make this guide easier to read, we have taken the following approach:

- We use the phrase '**governing board**' to cover both the maintained governing body and the academy board of trustees.
- We use the word '**schools**' to include academies (including free schools).
- We use the word '**governor**' as shorthand to mean those governing: governors, trustees and members of academy committees.
- We use '**headteacher**' to describe the lead executive. However, in a federation, the lead executive being held to account is likely to be an executive principal, while in a MAT, it is likely to be a chief executive held to account by a MAT board of trustees. There will also usually be academy-level committees of the main board where headteachers work with those committee chairs.



COVID-19 restrictions mean that governing boards have spent less time meeting in person and visiting schools than they're used to. This is likely to be the case for some time as boards support the efforts that schools are making to maintain effective control measures.

In the long term, we expect boards to return to the face-to-face elements of governance that are fundamental to governors and trustees knowing their school and building relationships. However, many boards will choose a blended approach which incorporates innovative virtual governance practices that have brought about efficiencies and promote sustainable ways of working.

This guide invites governing boards to reflect on virtual practices and provides advice and guidance to support effective virtual governance. This guide covers three distinct areas:

1. [Virtual meetings](#): board dynamics, chairing, reports and questions in advance
2. [Virtual monitoring](#): implementing a virtual monitoring programme and stakeholder engagement
3. [Virtual induction](#): adapting the board's induction programme

An information sheet covering [the logistics of virtual meetings](#) (including 'hybrid' meetings) accompanies this guide.

1. Virtual meetings

Board dynamics

Governing boards should have approved their arrangements for participating and voting in virtual meetings using the provision within maintained school governance [procedures regulations](#), academy articles of association and academy committee terms of reference.

A simple protocol or set of ground rules (agreed by the board and documented by the clerk/governance professional) should be in place to cover virtual meeting practices. NGA's [example virtual meeting protocol](#) can be adapted for this purpose.

The dynamics of virtual meetings clearly differ from in-person communication. Most governing boards progress quickly and efficiently through the agenda during virtual meetings; having courageous and challenging conversations in a virtual environment can be more difficult. Governing boards should reflect on their interactions and consider if their meeting protocol and practices promote effective teamwork in a virtual environment.

Questions for governing boards to ask themselves when evaluating virtual meetings:

- Has the virtual meeting environment changed our board's culture of challenge and support? For the better?
- Has the virtual format made it more difficult to ask challenging questions of school leaders?
- Do we structure virtual meetings so that everyone can make their voice heard?
- Are our virtual meetings inclusive? Do any governors need support using the technology?
- Are we maximising the virtual meeting technology? Could we use functions like chat or hand-raising to improve conversation flow?
- Does reduced in-person communication mean that we need to actively work on building and establishing relationships within the board? – consider setting time aside at the beginning or end of meetings (probably without school staff) to replicate the moments usually spent having a coffee and a catch up.
- Do we celebrate success? – this is particularly important in times of challenge, when recognising the achievements of the governing board can renew energies and galvanise the board.



Questions in advance

Questions submitted (usually via email) in advance of meetings can provide a good starting point for conversations in virtual meetings. However, there should be ample opportunity during the meeting for meaningful discussion, ensuring that governors fulfill their responsibility to challenge and hold leaders to account.

Chairs, school leaders and clerks must work together to find effective and efficient ways to prepare for and run meetings (virtual or otherwise). All parties need to understand the routines and expected conduct before and during meetings.

Signing the minutes

There are no prescribed methods to satisfy the requirement for minutes of meetings to be 'signed'. Instead of signing the minutes in the usual (pen and paper) manner, the chair may use alternative methods to record that the minutes have been reviewed and are confirmed by the board to be an accurate record of the meeting and any decision making. This could be any method of electronic signature or a confirmation email to the clerk (with the chair's name typed at the bottom of the email or added directly to the minutes document).

The importance of chairing

The chair plays a fundamental role in ensuring that virtual meetings are well run. Chairs may need to adapt their usual approach in order to achieve an atmosphere and dynamics between members of the board that supports good teamwork.

[The Chair's Handbook](#), produced by NGA, provides guidance on effective chairing, including the following considerations that are pertinent for virtual meetings:

- ***"The chair needs to be aware of the flow of the discussion and who has not spoken on each item"***. Effective decision making is supported by a range of diverse views. However, in virtual meetings, most attendees are muted at any one time and so the conversation can become stilted. Inviting each governor to speak in turn on a given topic may help the chair to ensure that the positions of all parties have been heard.
- ***"Good decision-making requires a balance between efficiency and enabling the board to get to the heart of the matter"***. Chairs are mindful that governors are volunteers with limited time, and they will want to promote a good work-life balance for school leaders. As such, chairs can feel under pressure to progress through a meeting as quickly as possible. The chair may need to play 'devil's advocate' in order to avoid reaching conclusions too readily. This helps ensure that governors have fully explored the topic and understand the decision being made, and all its implications.

Familiarity and confidence with virtual meeting technology will help chairs. Where required, training and support could come from other board members. Our [virtual meeting information sheet](#) includes practical advice to help chairs run successful virtual meetings.

NGA's [Leading Governance leadership development programme](#) is designed to help chairs and aspiring chairs assess their effectiveness, problem-solve, and create and sustain their own networks.

The importance of professional clerking

Clerks/ governance professionals provide expert advice, guidance and support that is essential at all times, but particularly whilst governing boards are adjusting to different ways of conducting their business.



Clerks and governance professionals have a role to play in embedding and evaluating virtual governance practice. As such, when considering making changes to meeting practice and routines, chairs should work closely with their clerk, drawing upon their knowledge and expertise.

As with in-person meetings, clerks provide support with most administrative tasks relating to the organisation of virtual meetings, for example, distributing joining instructions. Clerks/governance professionals also provide procedural advice, such as on voting procedures, that gives boards the clarity they need to make the most of their meeting time.

Reports to the governing board

Termly headteacher reports provide governing boards with the information they need to do their job well and so it is the governing board who agree the content and format. The key elements of headteacher reports are:

- contextual information such as numbers on roll and any significant changes to the organisation of the school
- an overview of the progress made towards meeting the priorities in the strategy document including the supporting headline data
- an assessment of current resources that includes the identification of any issues
- matters of compliance such as safeguarding, financial and audit requirements

Further guidance on constructing and using the headteacher's report can be found in our [Being Strategic guide](#).

For many boards, virtual meetings have coincided with a shift to more concise reports from headteachers. This is in response to increased staff workload and, appropriately, governing boards and school leaders focusing on a refined set of priorities. For some, this is a necessary but short-term change. Others have seen the positive impact of reports that are easier to interpret and quicker to produce without compromising scrutiny and so have made a commitment to sustain this approach.

Governing boards should also consider whether there is a need to adapt the report format to suit the virtual meeting environment. Governing boards may benefit from creative and dynamic formats that include photos and videos, perhaps using a PowerPoint presentation rather than a word-processed document. Any effort to change report format should be approached in a collaborative way that is sensitive to the headteacher's time constraints and actively seeks out opportunities to reduce workload.

2. Virtual monitoring

Implementing a virtual monitoring programme

Carrying out visits, meeting staff, pupils and other stakeholders is fundamental to governors and trustees knowing their school. Monitoring visits also help the governing board understand how issues discussed at board level translate into everyday school life. However, regular monitoring visits to school have generally not been feasible during the pandemic.

The challenges brought about by reduced in-person contact can be overcome to an extent by school staff and governing boards working together to implement a virtual monitoring programme. This incorporates virtual meetings between governors allocated specific areas of responsibility (e.g. safeguarding) and relevant members of staff. Whilst the monitoring is taking place virtually, the approach is much the same as for carrying out visits in person. When carrying out remote monitoring, governing boards should:



- Focus on strategic priorities and key policies – priorities are likely to have been adapted in response to the pandemic; safeguarding and pupil and staff wellbeing should be key areas of focus for all governing boards at present.
- Continue to meet virtually with staff (such as the designated safeguarding lead) in order to ensure effective procedures are in place.
- Prepare for meetings with staff by reading relevant background information and context relating to the monitoring discussion e.g. section of the strategic plan, any relevant performance data, policies and stakeholder information.
- Observe the protocol for visiting in person when meeting with staff virtually (as regards expectations of conduct, confidentiality etc).
- Extend the professional courtesies and acknowledge the help and support provided by staff.
- Be clear that notes taken during a discussion are for feedback purposes and not for recording judgements.
- Ask questions as part of the conversation.
- Prepare a brief report following meetings with staff and share with the governing board (giving the member of staff and chair opportunity to comment on a draft of the report).

Above all, a virtual monitoring programme should consider the workload implications for staff who are likely to be engaged in it. This means having pragmatic conversations with school leaders about what a practical and appropriate monitoring approach looks like, considering the school's COVID-19 control measures. It's important to have these conversations regularly, as the situation evolves. As boards strive to balance support and challenge, all governors need to understand the ground rules and expectations for virtual monitoring.

NGA's Learning Link provides access to bitesize e-learning on [governance monitoring: a tool to help drive improvement](#).

Stakeholder engagement

The connection that governing boards have with their school community is of vital importance, perhaps now more than ever. When visits are not possible, governing boards will need to find new ways to engage with, and capture the views of, their stakeholders. There may be opportunities to meet with a group of pupils virtually, such as during a virtual meeting of the school council. Governors could make themselves visible at any events that the school is hosting virtually (such as assemblies or collective worship). Online surveys and virtual focus groups can also be used to understand the views of staff and parents and the challenges they may be facing.

Regardless of how boards decide to interact with their school community, they should ensure that stakeholders can continue to make their voices heard, shape the discussion within board meetings and inform decision making. NGA's [parental engagement information sheet](#) provides further guidance on this topic.

3. Virtual induction

Every governing board should have an induction programme in place that helps new governors become familiar with their role and responsibilities as soon as possible. In normal circumstances, induction programmes include some or all of the following:

- a meeting with the chair or another experienced member of the board and the headteacher
- in a multi academy trust, a meeting with a trustee or member of the trust's central team or equivalent to learn about the vision and aims of the trust
- an information pack, or links to useful documents on the school's website



- an introduction to the clerk to the governing board
- a tour of the school and time to talk to some pupils
- assigning a mentor or buddy governor/trustee to guide the new governor through the first few months in the role
- access to external induction training, typically provided by the local authority, academy trust or a specialist organisation such as NGA
- access to a range of training to enable greater depth of understanding of school governance

In many cases, induction is a responsibility delegated to the vice chair. Whoever is responsible, the board's induction programme will likely need to be adapted in light of current (virtual) ways of working. An adapted induction programme could include:

- Virtual meetings with appropriate governors and school staff (the chair, headteacher and clerk as a minimum).
- Encouraging new governors to get to know the school - this may be more limited than usual but should include accessing the school website, social media, Ofsted reports, prospectus, data etc.
- Opportunities for the new governor to engage with the school community – see guidance on [stakeholder engagement](#).
- Coverage of the ground rules and expectations for virtual meetings, ensuring that new governors can access the technology – arrange training or support if required.
- Establishing relationships within the board (that may otherwise happen organically when meeting in-person) – consider assigning a mentor to act as a first port of call for new governors to ask questions and access support when needed.
- Shadowing (perhaps facilitated by a mentor) - this could be during a virtual committee meeting as an opportunity to get used to the technology in advance of a full governing board meeting.

NGA provides a range of training and development opportunities for new governors and trustees, including [Learning Link](#) which offers flexible e-learning.

NGA's [Welcome to Governance](#) and [Welcome to a Multi Academy Trust](#) are comprehensive guides for new governors and trustees. They also provide further detail on what governing boards should include in an induction programme.

Further reading

- [Virtual meetings: the logistics](#)
- [Example virtual meeting protocol](#)
- [Parental engagement: ensuring stakeholder voices are heard during this difficult period](#)
- [Remote education: expectations, support and monitoring](#)
- [Parent governor and trustee elections: requirements and approach in the current climate](#)

NGA are here to help

- Our GOLDline advice service has supported a record number of boards this year. If you're an NGA GOLD member, you can [raise a request for bespoke advice here](#) or call 0121 237 3782.
- If your board has a vacancy, the [Inspiring Governance service](#) can connect your school or trust with skilled volunteers who are interested in becoming a school governor/trustee.