


Trustee & Governor induction

THE
C  **MPASS**
PARTNERSHIP OF SCHOOLS

Policy adopted:	Summer Term 2021
Other related Policies	Code of governance Gifts & Hospitality Scheme of Delegation Whistleblowing
Next Review:	Spring 2025

Induction objectives

The objective of induction is to provide a new trustee/governor with the information they will need to become as effective as possible in their role within the shortest practicable time. The induction process aims to enable the new trustee/governor to:

- build an understanding of the nature of the Trust, its purposes and the communities in which it operates
- develop understanding of the role, including legal duties
- build a link with staff – whether senior leadership team members, teachers, other staff, or pupils and their parents
- build an understanding of the Trust's main relationships (eg the Local Authority, Department for Education and the Education and Skills Funding Agency, the Confederation of School Trusts).

The induction will be tailored to the needs of the particular trustee/governor to avoid repeating information the individual is already aware of. The content will be delivered using a variety of methods, over an extended period.

Many of the topics listed below will be best conveyed by making the trustee/governor aware of the source document, and providing a summary of the key points and how they relate to the Trust, where appropriate. Relevant documentation will also be available via the Trust's SharePoint system/website. The Director of Operations and Partnerships and Chair of Trustees (for Trustees) and the relevant Headteacher/Local Committee Chair (for governors), will ensure an ongoing dialogue with the trustee/governor to avoid any gaps or oversights in the individual's developing knowledge. The new trustee/governor will complete the Compass Skills Audit on appointment, in order to inform the induction process.

The Chair of the Board of Trustees/Chair of the Local Committee may allocate an experienced trustee/governor to mentor each new trustee/governor as required. The mentor will co-ordinate the induction in liaison with the Director of Operations and Partnerships (for trustees) and/or the relevant Headteacher/Local Committee Chair (for governors).

The Executive Head/Head Teacher will invite each new governor to the school to meet with them, tour the school and be briefed on current priorities.

Role of the trustee//governor

Governor:

Suggested activity	Who	Timeframe
Brief outline of the role	LC Chair	Within 2 weeks of appt.
DfE Governance Handbook	School	Within 2 weeks of appt.
Governance Code of Conduct	School	Within 2 weeks of appt.
Scheme of Delegation	School	Within 2 weeks of appt.
Academy Trust Handbook	School	Within 2 weeks of appt.

SEF	School	Within 2 weeks of appt.
SDP	School	Within 2 weeks of appt.
Minutes of previous meetings	School	Within 2 weeks of appt.

Trustee:

Suggested document/activity	Suggested timeframe
A brief outline of the role of the trustee and a summary of their responsibilities and continuing obligations. This may need to be more detailed where the appointee has no previous experience	Upon appointment
Department for Education's Governor's Handbook	Upon appointment
Scheme of Delegation	Upon appointment
Academy Trust Handbook	Upon appointment
Key policies: <ul style="list-style-type: none"> • Governance Code of Conduct • Governor Visits • Gifts & Hospitality • Risk Management • Safeguarding including Child Protection • Scheme of Delegation • Whistleblowing 	Upon appointment
Any trustee insurance that may be in place (covered by RPA)	Upon appointment

Local Committee/board issues

Suggested document/activity	Suggested timeframe
Governing body/board structure and schedule of meeting dates	Upon appointment
The contact details of other trustees/governors and the executive/senior leadership team	Upon appointment
The minutes and agendas of the last two meetings of the governing body/Board	Upon appointment
A list of current trustees/ governors and their respective dates of appointment	Upon appointment
A description of the procedures to be adopted at local committee/ board meetings: <ul style="list-style-type: none"> • when the papers are sent out • normal location of meetings • duration of meetings • an indication of the routine business transacted • procedure for raising items for consideration • board etiquette policy 	Upon appointment

• domestic arrangements e.g. access, parking etc	
Conflicts of interest policy and register of interests	Upon appointment
Training in the use of the governance section of SharePoint	Upon appointment
Corporate calendar which details important dates for the school, including annual returns, general meetings, etc	Three to six months
Details of relevant committees (Trustees only) e.g. Business, Audit & Risk, Standards and general purposes, with: <ul style="list-style-type: none"> • terms of reference for each committee • specifications of those responsibilities delegated by the trustees/ governors to any committees • reporting requirements • names of those serving on any committees 	Three to six months
Board, committee and individual trustee/ governor evaluation processes	Three to six months
Board/governor training and development programme	Three to six months
Most recent board evaluation report and school Ofsted reports	Three to six months
Board composition, board renewal, succession plans and policy on trustee/ governor re-election/re-appointment. Details of procedure for resigning or removal from office, where appropriate.	After six months

The nature of the school/ Trust

Suggested document/activity	Suggested timeframe
An up-to-date copy of the articles of association	Upon appointment
A copy of the strategic plan	Upon appointment
A copy of the business plan, and any school improvement plan	Upon appointment
A copy of the mission statement, vision and values	Upon appointment
A brief history of the school(s), including educational performance	Upon appointment
The annual report and accounts for the past three years (where they exist), audit report and Ofsted reports, current annual budget and most recent management accounts	Upon appointment
Details of the Trust's professional advisers (e.g. accountants and solicitors)	Upon appointment
Details of the academy's funding agreement and other information held by the principal regulator and website details for each regulator or registrar (including the Charity Commission and Companies House)	Upon appointment
Current non-statutory review and/or impact report, where applicable	After six months
A copy of all management accounts prepared since the Trust's last audited accounts	After six months
Details of any significant contractual obligations	After six months
Summary details of the Trust's insurance (DfE Risk Protection Arrangement)	After six months

Details of any ongoing litigation presently being undertaken either by the academy or against it	After six months
The Trust's risk profile and tolerance, risk management and internal control procedures and relevant disaster recovery plans	After six months

Building a link with the Trust's people

Suggested document/activity	Suggested timeframe
An organisational chart – including senior leadership staff, premises, etc	Upon appointment
Meetings with senior leadership team	Appointment & ongoing
Internal staff survey results	After six months
Site visits and observations	Ongoing

The Trust's key relationships

Suggested document/activity	Suggested timeframe
Relevant media coverage, of a positive nature or otherwise	Upon appointment
Recent and relevant correspondence with regulator(s)	Three to six months
Copy of complaints procedure including a précis of any major complaints and incidents resolved in past two years	Three to six months
The minutes of the last two general meetings	After six months

Committee induction

Where a trustee will be joining a committee, they should be provided with copies of the committee minutes from the preceding 12 months.

Suggested document/activity	Suggested timeframe
Name, role, remit and terms of reference of committee	Three to six months
Link between committee policy and the Trust's strategic objectives	Three to six months
Members of the committee, and those regularly invited to attend meetings	Three to six months
Meeting schedule and Committee Planner	Three to six months
Main business and financial dynamics and risks	Three to six months
Current issues affecting the committee's business	Three to six months
Technical training on key matters, tailored according to level of expertise.	Three to six months

Monitoring, evaluation and review

The Board of Trustees will assess the implementation and effectiveness of this policy. The policy will be promoted and implemented throughout all Trust schools.

This Policy will be reviewed by the Board of Trustees on a 3-yearly cycle.

Adherence to the policy will be monitored by the school's local committee.