



# Governors' Handbook 2018 - 2019



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## Foreword

Welcome to school governance and thank you for volunteering to take on this most important role. You can make a difference to the lives of children, young people and the wider community of Jersey.

Being a school governor is a role with significant responsibility. It is similar to being a charity trustee or a non-executive company director. Jersey is going through a time of change and financial constraint. There is greater diversity in our schools and more decisions to be made by Governing Bodies (GBs).

Governors are the guardians of the school's values and ethos. You can take initiatives and make changes in the way you work. You can set your own agendas and measure what you value.

Asking good questions is at the heart of your role. Ask the school leaders the right questions, at the right time and in the right way. Question yourself too and your fellow governors. If meetings are not focussed on the pupils, question why. Just because school has always done something in a certain way, doesn't mean it can't be improved.

Establish professional relationships with the school's leaders. Take sound advice (and perhaps sometimes external advice) before making decisions. Don't be afraid to seek collaboration with other schools.

Be sure that other stakeholders' voices are heard. These people include pupils, parents and staff. Help to create a culture in which your staff will wish to stay and a school climate which will provide the best possible education for all the school's young people.

Work with the school to reduce the gap that exists between children from disadvantaged families and others. Continue to monitor and seek out the best ways in which your school can make a difference.

Thanks to the National Governance Association (NGA) for their advice and support and thanks to Lisa Cashion and Joanna Pope for their administrative support with this document.

We hope you will find this handbook helpful.

A handwritten signature in black ink, appearing to read 'LPS', followed by a long horizontal line extending to the right.

Dr Lesley P. Stagg - Senior Adviser  
Standards and Achievement Team  
States of Jersey - Children, Young People, Education and Skills  
November 2018

# 1 Introduction to governing

This chapter covers:

- The role of the Governing Body (GB)
- Your responsibilities as a governor
- The benefits of being a governor
- What you need to know about personal liability and conflicts of interest
- The composition of the GB
- Clerk to the GB
- Training and development

“Governance determines who has power, who makes decisions, how other players make their voice heard and how account is rendered.”

The Institute of Governance, Canada (Independent not-for-profit public institution)

Good governance is essential to the success of any organisation. As governors our overarching aim is to ensure the wellbeing of the children and young people in our schools and enable them to achieve to the best of their ability. The challenge of governance is in how we accomplish this by exercising the five core functions and working within the legal regulations that apply specifically to our schools.

## 1.1 The role of the GB

School governing bodies must act collectively in the best interests of the children, ensuring the good conduct of the school and promoting high standards of educational achievement.

We suggest there are five distinct elements:

1. The relationship and distribution of rights and responsibilities among those who work with and within the school.
2. The philosophy and procedures that underpin the school’s objectives.
3. The means of achieving those objectives and monitoring performance.

4. The assigning of accountability throughout the school.
5. Being an ambassador for the school in the community.

The head teacher is responsible for the internal organisation, management and control of the school and the implementation of the strategic plan agreed with the GB.

## 1.2 The benefits of becoming a governor

There are immediate and lasting benefits to becoming a school governor. In volunteering your time you are making a positive contribution to the success of your school and are therefore having an impact on the lives of it is pupils, staff and the local community. In addition, the role can help you develop transferable skills that are useful in your working life.

Some of the opportunities include:

- experience of strategic planning and developing
- setting aims and objectives for reaching ambitious goals
- working within a diverse team
- recruitment and performance management of senior leaders
- financial planning, budget control and setting pay
- gaining greater awareness of the education system

- being part of debates and asking challenging questions to support school improvement
- getting to know the community in which you live and/or work
- using your existing skills in a new or different way.

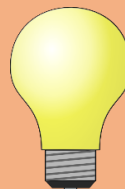
### 1.3 Induction to the GB

When you take up your position on the GB, an induction programme should be arranged so that you become familiar with your role and responsibilities as quickly as possible.

The role of the clerk in organising and facilitating the training should be made clear to new governors.

An induction programme might include some or all of the following:

- A meeting with your chair or another experienced member of the board and the head to welcome you and explain how the schools works.
- An information pack, or links to useful documents on the schools website.
- An introduction to the clerk of the GB, who can be an invaluable source of information and support.
- A tour of the school and maybe a little time to talk to some of the pupils.
- A mentor or buddy governor to guide you through the first few months in the role.
- Access to external induction training, typically provided by the SoJ. Face-to-face training is recommended as this enables new governors to ask questions and to network with others but an online programme may suit the busier governor.
- Access to a range of training to enable greater depth of understanding of school governance, e.g. on data, funding, special educational needs and Jersey Premium.



If an induction programme is not made available to you, do enquire about options, at the very least the possibility of a mentor. As with any new role, the amount of information you are given may feel daunting initially but you are not expected to take it all in at once.

The basic information provided to you should include:

- a list of governors and their contact details
- details of any of the GB's committees and their terms of reference
- the school's current prospectus (if the school has one) or a link to information on the school's website
- information about the current performance standards in the school plus external data sources
- the school and the GB's most recent self-evaluation or facilitated review
- the code of conduct
- a calendar of meetings for the year, for both the full GB and its committees
- the current strategy document
- the most recent Jersey Review report
- access to the statutory and non-statutory policies adopted by the GB.

### Term of Office

GB's can determine the term of office. The term of office will be stipulated in the instrument of government or the articles of association.

SoJ recommends that only in exceptional circumstances is it likely that an individual will have the capacity to "serve effectively" on more than two GB's.

## 1.4 Relationship with the headteacher

It is vital that the GB has an effective relationship with the head teacher, as well as with other executive leaders, as they will be the main source of information on the performance of the school. Mutual trust is essential – the head teacher must share problems with the GB and both the head teacher and the GB must always respect confidentiality. It is important this relationship remains professional and does not become so cosy that governors no longer feel comfortable to ask challenging questions.

In the vast majority of schools, headteachers have the right to be a governor. Most choose to be a non-executive member of the GB and therefore have a dual role: they are a member of the accountable body but are also held to account by the body of which they are part. As such they must act strategically, but in their operational role are responsible for implementing the strategy as agreed by the GB.

## 1.5 The composition of the GB

There is no best size for a GB, although the SoJ cautions against boards that are too large. Research shows that effectiveness is less about size and more about who is sitting around the table and what skills they bring. It is worth bearing in mind that if a GB is very small there may not be enough members to share the tasks; while GB's above a certain size can find it hard to be decisive in full GB meetings. The findings from the 2017 NGA/TES survey suggest that the majority of the school GB's (57%) have nine to twelve members, 12% have fewer than nine members while just over a third have more than 13 members.

## 1.6 Clerk to the GB

One of the most important people the GB works with is the clerk. An effective clerk is an invaluable resource and a key element in the success of any GB. The clerk's role includes providing advice and guidance to the GB, circulating papers for meetings in advance,

maintaining a register of board members and their pecuniary interests, and taking minutes.

The clerk is there to assist the GB and should have a clear job description.

All clerks must be performance managed and receive an annual appraisal. It is good practice for clerks to be appraised by their direct line manager. This is likely to differ depending on how the clerk's services are provided but, as a general rule, for those employed directly by the school, it is likely to be the chair. For those employed through the SoJ, it will be their line manager within that particular service.

Even where the clerk is employed through the SoJ, the chair should take the opportunity to have an annual review of what has gone well and not so well.

GB committees must also be clerked. While it is all right for a governor, but not the head teacher, to clerk a committee, good practice is for this to be done by a high-quality person.

The DfE in England has published the Clerking Competency Framework. This non-statutory guidance sets out the competencies required for professional clerking and details the specific knowledge, skills and effective behaviours for clerks.

## 1.7 Training and development

It is essential to ensure all governors are clear about what their powers and responsibilities are, and are equipped to address them.

Following induction training, further training is recommended in order to develop knowledge and skills. Relevant topics may include: the use of data; finance; special educational needs and disabilities (SEND); safeguarding; Jersey Premium and Jersey Reviews.

Individual governors should be proactive in identifying their own training needs, either independently or in discussion with the chair. SoJ strongly recommends that the whole GB undertakes a skills audit to highlight any gaps in their collective skills.



## 1.8 Personal liability, risk and insurance

It is the GB as a single entity that is responsible for any decisions it takes. This means that in the vast majority of cases, it would be the GB as a whole, rather than any individual, that would be held liable should any fault be found in both the board's decision-making process and the conclusions it comes to. This is true even if the actual decision is taken by an individual or a committee of the GB, provided that each has been delegated that authority. However, decisions must be made in good faith and, when necessary, advice sought – and acted upon.

### Risk management

All governors should have some understanding of risk. The main areas of risk for a school GB are:

- health and safety
- data protection
- special educational needs
- failure to meet standards and expectations for pupil progress.

### Data Protection

The overall responsibility for data protection is collective. Even if you're lucky enough to have a data protection expert on your board, everyone needs a strong baseline knowledge of the school's data protection duties, and what the rules introduced by the Data Protection Law (Jersey) 2018 mean.

The Data Protection Law (Jersey) 2018 sets out the key principles that all personal data must be processed in line with. Data must be:

- processed lawfully, fairly and transparently
- collected for specific, explicit and legitimate purposes; limited to what is necessary for the purposes for which it is processed (data minimisation)
- accurate and kept up to date
- held securely (both physically and online)

- only retained for as long as is necessary for the reasons it was collected.

There are also stronger rights for individuals regarding their own data. The individual's rights include:

- to be informed about how their data is used
- to access their data
- to rectify incorrect information
- to have their data erased
- to restrict how their data is used
- to move their data from one organisation to another
- to object to their data being used at all.

It is incumbent upon you, as a Governor, to maintain upmost confidentiality regarding any information that you are privy too and as such will be expected to sign a confidentiality agreement that is renewed annually.

### Conflicts of interest

Governors are required to act in the best interests of the school at all times, and consequently any other loyalties must be put aside when considering GB business. A conflict of interest is any situation in which personal interests or loyalties could, or could be seen to, prevent the governor from making a decision only in the best interests of the school.

Conflicts of interest may be financial (known as pecuniary interests) or conflicts of loyalty (eg potentially where a governor is related to, or is a good friend of, a member of staff).

All GB's must maintain a register of their interests including those of governors, and head teachers. Individuals will be asked to complete a declaration of interests form at the beginning of each academic year (or when they first take up office). The register is usually a simple form which sets out any interests that could potentially conflict with the individual's duty to act in the best interests of the school. An example would be if a governor runs a building firm that might bid for school building contracts.



It is also necessary to register any relationships between governors and school staff, and any interests of close family members which could be seen to influence decision-making (including a spouse, partner, child or other relative).

In addition to the register of interests, governors must disclose at the beginning of every meeting, any interest in any particular agenda item. Where there is an interest, s/he must leave the meeting during the discussion of that item and will not be allowed to vote. This is known as managing the conflict of interest.

In general, it is always better to avoid conflict of interest, rather than manage it. When considering governing at a particular school, it is a good idea to examine the possibility of conflicts. If these are likely to arise, it is probably better to seek to govern in a different school.

## Confidentiality

Governors must respect confidentiality, especially if information concerns individual members of staff or pupils. Such information must not be divulged outside the GB and in some cases, where for example there are disciplinary issues, should not be divulged to other board members. This is because it may

become necessary for a number of board members to hear appeals or complaints from staff or parents; any member of the board with detailed prior knowledge of the issue would be prohibited from taking part in the hearing.

Test your knowledge	
1	Are you clear as to what type of school you govern at?
2	Can you describe and explain the five core functions of the GB to a new governor?
3	What should the primary motivation of every GB be?
4	Can you articulate the different roles of the GB and the head teacher?
5	Why do you think that the relationship between the Headteacher and the GB is so important?
6	SoJ believes that having a professional clerk is an essential element for good governance. Why do you think that is?
7	What key documents should have been provided to you when you joined the GB? Do you understand them?
8	You may well find that you need support and advice to help you fulfil your role as governor, possibly at short notice. Where would you look for support and advice?
9	You find out by accident that the building company of a personal friend of the chair and new head teacher has been engaged to build a new sports facility for the school. What would you do?

## 2 Education overview and Jersey school context

This chapter will cover:

- The Jersey context for schools
- How schools collaborate
- Working with the SoJ
- Engaging with the local community
- Relationship with the Standards and Achievements Team in Children, Young People, Education and Skills (CYPES)

### 2.1 The Jersey context for schools

The context for schools in Jersey has undergone significant change in recent years.

Some schools are looking at the benefits of formal collaboration. The SoJ continues to take steps towards building an education system focused on sustained school improvement.

SoJ does not take a view on school structures or if any one structure is better than another in bringing about the school improvement. However, where a school is underperforming the GB does need to be honest and realistic about their own effectiveness and ensure that an appropriate plan to improve the governance and management of the school is put in place. This will almost certainly involve assistance from the Standards and Achievement Department.

Formal partnerships between schools can be extremely valuable in improving outcomes for pupils, as well as offering increased opportunities for staff. Such partnerships have also been shown to facilitate improvements.

### 2.2 Collaboration

There are many ways in which schools can work together to share resources and expertise to help school improvement. Although informal collaborations can bring benefits to schools, the evidence suggests that formal partnerships are more likely to lead to long-term school improvement.

GB's should be proactive in their support for partnership working, and those that are not currently in a partnership should consider this as part of their school's strategic vision.

### 2.3 Relationship with CYPES

CYPES are civil servants who act on behalf of the Director General. Every school has an allocated Senior Adviser. This person is a very experienced educator and has held a senior leadership post in an educational setting. They support and advise the school, including the GB, and undertake regular evaluatory visits.

### 2.4 Relationship with your local community

Schools are an important part of the local community and offer it many facilities, ranging from the provision of education to a venue for adult learning and other community activities. A school's reputation is influenced by its standing within the community and governors should seek opportunities to raise the school's profile and celebrate its successes.

### 2.5 Relationship with other schools

Working with other schools in any context is a great way of sharing good practice and resources. Working together can bring real benefits for all the schools involved. Schools can work together in a variety of ways, either formally or informally.

## Other partnerships

Many schools work together without formal arrangements, often in cluster groups where staff and practitioners can share good practice.

Test your knowledge	
1	What benefits can be gained by schools collaborating?
2	Does your GB have a clear collaboration strategy and do you understand the particular benefits for the young people it is responsible for? Do you know which other school's your school has a relationship with?

# 3 Vision and strategy

This chapter will cover:

- Vision and ethos
- The GB's role in developing strategy
- Skills, competencies and experiences
- How much time should I be spending on governance?
- Policies

Being strategic: determining where we are, where we want to be, and how we are going to get there.

## 3.1 Vision and ethos

Ensuring clarity of vision is one of the functions for every GB. It is up to the governors to ensure the vision, ethos and strategic direction of the school are clearly defined.

The vision should state explicitly what the school will look like in three to five years' time, including a concise expression of what the children will have left school having learned. How your vision is achieved will be determined by the ethos and values – both matter but they are different.

The importance of a clear vision cannot be overstated. Without it, a school does not know where it is going or what it is aiming to achieve. In projecting forward a few years, the GB should be aiming to do things better, to continuously improve, to make the experience of school the very best it can be for children and young people. The policies for key areas of managing the school, eg performance management, curriculum, teaching and learning, and behaviour, can give a more concrete view of how the ethos is lived.

Other areas of the school ethos may include attitude to stakeholders. Meeting other, more experienced, governors and the headteacher will provide an opportunity to build a real picture of the school's ethos and

vision. Each school should publish its vision and ethos on its website.

## 3.2 Strategic nature of the GB

The role of the GB is a strategic one. Having established the vision, the GB must then agree the strategy for achieving this vision. The head teacher remains responsible for the internal organisation, management and control of the school and the implementation of the strategy.

### Agreeing the strategy

This process involves knowing, through self-evaluation, the school's strengths and weaknesses, having a clear vision of what the school will look like in three to five years' time, and agreeing the key priorities that need to be addressed in order to achieve this vision. The GB must monitor progress against these key priorities, including setting measurable milestones, and holding the head teacher to account for standards, financial probity and compliance with agreed policies.

### Operational: delivery of the agreed strategy

The headteacher has responsibility for the operational day-to-day management of the school. The distinction between governance and management needs to be clearly understood by all parties to ensure an effective working partnership. Day-to-day management includes: operational planning; spending within agreed budget headings; recruitment and deployment of staff; discipline in relation to individual staff or

pupils; supporting the improvement of teaching and learning; ensuring the appraisal and continuing professional development of staff; and developing and implementing policies and procedures to deliver the vision.

“The role of GB’s in defining and implementing strategy whilst holding the leaders of schools to account has to be the foundation upon a world-class education system is built.”

Sir David Carter, national schools commissioner for England, foreword to the competency Framework for Governance (Jan 2017)

If you keep following key questions that governors should ask at the forefront of your mind, you will not go far wrong.

- What are the school’s values and do we have a clear vision and strategy? Are they reflected in our long-term development plans?
- What are we doing to raise standards for all children?
- Have we got the right approach to staffing?
- Do we have a sound financial strategy, make the most efficient use of our resources, obtain good value for money and have robust procurement and financial systems?
- Are the buildings and other assets in good condition and are they well used?
- How well does the curriculum provide for and stretch all pupils?
- How well do we keep parents informed and take account of their views?
- Do we keep pupils safe and healthy?
- How does the school promote good behaviour to enhance learning?
- Do we offer a wide range of extra-curricular activities which engage all pupils?

### 3.3 Being strategic – making a difference

Having determined the vision and agreed the overall strategy for the school, the GB must then concentrate on monitoring whether the school is on course to meet its aims and goals. The GB needs to regularly check that the school is addressing the key priorities that were identified and that these are making a difference to children’s outcomes. In other words, focusing on the strategy should drive the business of the GB.

All GB’s should not only have an agreed vision and strategy, but should also have a short document that captures this information. This should detail what the vision is, with clear quantifiable outcomes and the priorities identified; the measures to demonstrate progress is being made; and the milestones used to check progress is on track. An effective school strategy document which is referenced at every meeting enables governors to focus on being strategic and avoid getting sidetracked into operational matters.

The GB should work closely with the head teacher on developing the vision for the school, consulting staff and other key stakeholders. Once the vision has been agreed and the strategy determined, consideration should be given to publishing it on school’s website.

Once the GB has agreed the strategy, it leaves the head teacher to devise the detailed operational plan for achieving it and to lead to the staff team in implementing it. The GB’s role is then to monitor progress.

### 3.4 The GB's role in creating a meaningful and vibrant strategic plan

The creation of a school's strategic plan is not just to produce a lengthy document that will gather dust on the head's shelf!

Participation in the strategic planning process is an important part of a GB member's responsibility. It can be long, intense and (some may say) arduous. However, the process is exciting and the final agreed plan always carries with it a great sense of achievement for the whole school.

Once in place, and provided it is reviewed and updated regularly (perhaps using a 'RAG rating model') to keep it alive and meaningful, it ensures the GB understands and stays focussed on ensuring the school is delivering its mission and safeguarding its future. Schools often create three year strategic plans but this may differ from school to school.

This focus (with clear delineation of GB members' responsibilities) ensures the GB members do not stray into operational matters. The GB can assure itself that the school's values are being upheld and its day-to-day activities are directly linked to the strategic direction and objectives.



We know from our Senior Advisers that strategy development is an area that many GB's and headteachers find challenging. GB's struggle to articulate a vision that goes beyond an academic year, or have a vision "to be outstanding" but without any identified priorities on how to get there. The vast majority of schools have a school development plan (SDP) or school improvement plan (SIP) that may be described as the strategic plan. Often, however, these documents are in fact operational/implementation plans without the overarching vision and strategic priorities attached.

The headteacher's report to the GB and self-evaluation should focus on the progress against the strategic priorities. This process is key to the governors' main responsibility: that of raising standards for children. Monitoring the progress of achieving the strategic priorities is therefore a key element of GB work. Many GB's do this through a system of committees, which look at particular elements in a planned way.

The headteacher or relevant senior or middle leader provides information to the committees, whose task is to ensure that the school is working towards or maintaining high standards, and that this is supported by the evidence. Governors should not be afraid to ask "how do we know?" or "what is the evidence for that?". This monitoring is a key part of the GB's core function to hold the head teacher to account for the educational performance of the school and also forms part of the school's self-evaluation process. Evidence of this process should be recorded in the minutes.

Governors should not neglect their own development. Governance is a complex issue - policies and priorities can and do change, so even long-serving governors need to update their knowledge, including having a commitment to GB self-review and future development of the GB. The GB should ensure that there is a section in the SDP that covers the GB's own development and training needs.



### 3.4 Self-evaluation

The GB is responsible for promoting high standards of educational achievement. To do this, the GB needs to be assured that the school's self-evaluation process is robust. The school needs to evidence what it does well, and what areas require improvement. If the evaluations are not accurate, the understanding of where the school is now will be skewed, and it is likely that the wrong priorities will be identified and pursued. Much of the evidence will take the form of data, surveys and reports. Governors need to be assured that judgements made on the basis of this evidence are sound. If there are doubts, trusted third parties such as the Senior Advisers should be sought to provide external validation of the information and judgements.

### 3.5 Skills, competencies and experience

The SoJ expects all governors to bring skills to the GB, and that both recruitment and training are specifically targeted to fill any skills gaps on the GB.

Schools must ensure that all appointed governors have the skills required to contribute to effective governance and the success of the school. GB's can specify any particularly desirable skills when putting out a call for nominations. It is expected that all governors can use email and access the internet and that they will have a good level of literacy and numeracy. Without these, it is not possible to perform the role well.

#### Skills audits

The guidance suggests that the GB should conduct a skills audit to identify any specific gaps that need to be filled by new board members. Some GB' already carry out skills audits for this purpose, as well as to establish the training needs of current members and to plan for succession. Regular skills audits also

enable the GB to identify ongoing training needs and develop a responsive training plan.

### 3.6 How much time should I be spending on governance?

The expectation is that the time spent on school governance should be similar to the time spent on being a trustee in the charity sector - in other words between 10 and 20 days a year. Initially, the commitment is likely to be nearer to 10 days a year; however, there may be periods when the time commitment increases. This could be when at times of particular challenge, such as when children are not achieving as they should.

As a new governor it is important to be clear about the expected time commitment, and this should be discussed with the chair during your induction. Some longstanding governors may tell you that they spend far more than 10-20 days a year on governance business; however, it's fairly common for governors to undertake additional volunteering roles over and above governance.

This can include activities such as listening to children read, helping with school trips, helping with promotional activities such as editing the school website, supporting fundraising, undertaking health and safety checks, undertaking regular bookkeeping monitoring or providing pro-bono professional advice.

These additional volunteering roles should not be confused with governance, nor should they be expected of new governors, many of whom will be in paid employment or have family responsibilities and so will not have the time. There is a danger that the time taken up by these other volunteering roles may prevent members of the GB from using their valuable volunteer time for governing.


One role which is likely to necessitate a bigger time commitment is that of the chair.



### 3.7 What policies should the GB have?

Some people find the idea of policies and procedures difficult to understand, and often matters are not helped when procedures are called policies or a document is a mixture of the two. For example, it is likely that the teacher appraisal policy will include both the overarching policy and the process by which teachers are appraised.

Many policies do not require sign-off by the full GB but there needs to be a clear record as to when any policy was approved. As all delegated decisions need to be reported to the full GB, the minutes of a meeting should record the information clearly. The clerk should keep a record of when policies were last reviewed and approved.



Consulting those who will be affected by policy decisions will make it more likely that they will feel part of the process rather than feeling that the policy is being imposed. The policies are then much more likely to be effective.

### 3.8 Policy development

The GB and the head teacher each have key roles and responsibilities in relation to school policies. The GB is responsible for ensuring policies are in place, but not for planning and formulating every one. For policies to be effective, it is important that both the GB and the head teacher work in partnership. Members of the GB should try to limit the amount of time they spend on policy matters by delegating this responsibility to committees or the headteacher.

Most GB policy documents cover both principles and procedure/process. They will include:

- a statement about what the GB wants to achieve (the principles)
- how this may be done (the procedure/process)
- the process for monitoring and review
- information the GB needs to evaluate the effectiveness of the policy
- in the light of the policy's effectiveness, how and when the policy will be reviewed.

The GB should ensure that all school policies are readily accessible, in particular to the chair, head teacher and clerk. All members of the GB should have an up-to-date list of school policies and know where they can obtain copies of the full policy. Many schools now publish their policies on their website, which simplifies access.

Test your knowledge	
1	Why is it vital for a school to have a clear vision? Do you understand what your school's/schools' vision is? Do you agree with it?
2	Who should be involved in the development and refinement of the vision for the school(s) you govern and why?
3	Who is responsible for ensuring implementation of the vision and what is the GB's role?
4	Can you summarise the skills needed by your GB and what a skills audit should achieve?
5	What is the GB's role in policy development? What is the head teacher's role?
6	Why is it important that your school has effective policies?
7	Can you articulate the interrelationship between school values, vision, strategy and policies?
8	You have been asked by the chair to draft a new policy for the school in an area with which you are familiar because of your professional experience. How would you respond to the request?

# 4 Effective governance

This chapter will cover:

- How to prepare for GB meetings
- Attendance and the formalities of meetings
- Delegation and the role of committees
- The establishment and proceedings of committees
- Chair and vice chair
- Special educational needs and disability (SEND) governor/trustee
- Child protection governor
- Link governors
- Committee chairs

## 4.1 What constitutes effective governing body performance?

- Being skilled, knowledgeable and committed people.
- Knowing questions to ask rather than exercising authority.
- Understanding purpose and demonstrating this at all times.
- Acting to ensure the school's objectives and strategies are met.
- Being accountable and transparent.
- With the school's stakeholders, establishing goals, setting policy, planning strategy but never being part of the day-to-day management.
- Holding effective, regular and timely meetings with a timed agenda and circulated minutes.
- Evaluating one's own performance and that of the head.
- Believing in continuous GB improvement.
- Creating an integrated partnership with the head and SLT.
- Good governance demonstrates EYES ON, HANDS OFF!

## 4.2 Maximising harmony between the GB and leadership, and thereby ensuring the success of the school

- The GB should identify and build on what they are doing well, and ensure that within the school's strategic plan there are clear governance goals.
- The GB must recognise the need to communicate and collaborate within themselves and the school's stakeholders.
- No GB member should work in isolation, and all GB members should remember that they are part of two teams i.e. the GB itself and the partnership with the school's leaders.
- At all times the GB must think strategically and not operationally.
- Ongoing training throughout the year is key, and must be accompanied by a sense of accountability for actions taken.
- School leaders must learn to build on the strengths of their relationship with the GB, and to work effectively in an open manner with their GB partners.
- All GB members are shown equal status by the head and staff.

- All GB members should know the school and its mission well, with the head orchestrating their growing understanding of the key issues and programmes being implemented.
- All GB members' visits to the school should be arranged via the head or SLT.
- Any recommendations or complaints to GB members should be shared directly with the head, and referred as necessary to the GB on the advice of the head.
- Heads should expect questions from the GB regarding operations of the school, and accept them in a positive manner conducive to harmonising GB-head relations and communication. The head can decide when and how to respond directly to these questions.
- The head must deal openly, honestly and courteously with the GB at all times.

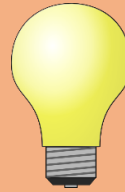
### 4.3 Chair and vice chair

All GB's must have a chair and vice chair. There are no set rules on how the election of the chair and vice chair should be carried out. Any governor standing for election must withdraw from the meeting when the vote is taken. The GB must decide what the term of office for the chair and vice chair should be. Many GB's choose to have annual elections. No one paid to work at the school can be elected chair or vice chair.

Their term of office is usually one year, although they can stand for re-election. The election usually takes place at the first meeting of the autumn term.

The chair leads the GB and ensures that it meets all its responsibilities. A good chair will build an effective team, ensuring that all governors participate fully in meetings and committees, and will develop the knowledge, confidence and skills of the GB. The chair needs to be well informed about Jersey and England's education issues and share this

information with the GB. He or she needs to have a close, supportive, but not exclusive, relationship with the head.



There is no limit on how many times a chair can stand for re-election. However, all chairs should consider stepping down once they have served six years in office at the same school. This allows for a healthy turnover of people, prevents cosiness developing between the head and the chair and also encourages newer governors, who may feel rather awkward about standing against a long-serving governor, to put themselves forward for the role.

The vice chair acts as chair when the chair is unavailable. If the chair resigns between meetings, the vice chair assumes the role of chair until a new chair is elected at the next meeting. Chairs and vice chairs should decide between themselves how the workload is divided between them, according to individual areas of interest and expertise.

### 4.4 Meetings of the GB

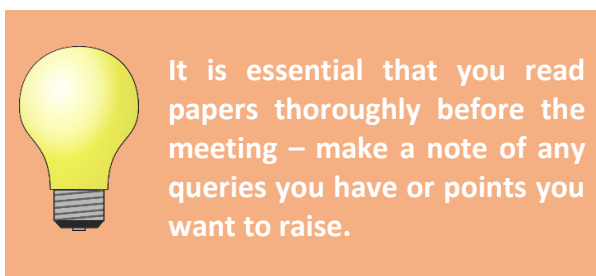
The GB conducts most of its business, including its decision-making, through formal meetings. There must be a minimum of three full meetings of a GB each year, but many GB's choose to meet more often than this. Any three members of the GB can request an additional meeting at any time by submitting a request to the clerk. If such a request is received, a meeting must be held.

GB's can allow individual members of the board to participate in meetings remotely, for example by video/ teleconference (but not email). You may be asked to sign a code of conduct when you join the GB, which will establish what is expected of you in meetings.

The clerk should circulate the agenda for the meeting, the minutes of the previous meeting, and any papers relating to agenda items, including the head teacher's report. The meetings should monitor progress with regard to the strategic priorities and how these are being made operational through the school development plan (SDP).

The minutes of a meeting should be circulated as soon as possible after it has taken place, but it is good practice for the clerk to recirculate them with the other papers for the following meeting. Individual board members may propose additional items for the agenda - contact the clerk or the chair for advice. Additional papers for the meeting will depend upon the working practices of your GB, but may include:

- minutes of committees or working groups
- any other reports to be discussed at the meeting
- training details and notice of future events.



## 4.5 At the meeting

### Attendance

It is absolutely vital that all members make every effort to attend full GB meetings to discuss issues and make decisions. Of course, there will be times when it is not possible for you to attend. When this occurs you must make sure that you inform the clerk and the chair as soon as possible, and be prepared to explain the reason for your absence so that other board members can decide whether or not to accept the apology. Any board member who does not attend meetings for a continuous period of six months without the

agreement of the GB will be disqualified from continuing to hold office as a governor of that school. If the GB accepts apologies, it has consented to the absence.

Decisions can only be ratified if the GB is quorate - that is, if a sufficient proportion of its members are present. The first item on every agenda is apologies from governors who could not attend; this will enable the clerk to determine whether there are sufficient numbers for a quorate meeting. The suggested quorum is 50% of the complete GB.

### The formalities

The chair will lead the meeting, following the agenda. As well as apologies there are usually the following standard business items:

- declaration of interests
- approval of the minutes of the previous meeting
- any specific action points from the previous meeting
- matters arising from those minutes (not covered by a separate agenda item)
- urgent actions - if the chair has taken any action under emergency/ordinary powers this must also be reported to the full GB
- the date of the next meeting should be confirmed (the meeting schedule for the year will already have been agreed).

### Dissolution

In the event of the breakdown in communication or effectiveness of a GB, the Director General of CYPES may decide to dissolve the GB.

### Publication of papers

GB minutes of meetings should be available at the school for any member of the public to read. The exception to this is any business that the GB has classed as confidential.

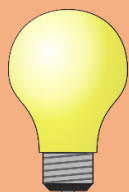
## 4.6 Committees of the GB

Most GB's use committees to carry out much of their business. The GB decides the constitution, membership and terms of reference of all committees, and must review these annually. Common committees include: premises, staffing, finance (often combined in one resources committee) and curriculum (sometimes called progress and attainment or standards committee). Each committee must have a chair and a clerk - the GB will decide whether to appoint the chair or whether the committee should do this.

For committee meetings, the quorum is a minimum of three members of the committee, unless the GB has set its own higher limit. Any decision taken must be determined by a majority of votes of those governors and associate members present and voting. In turn, a vote will not be valid unless the majority of committee members present are also governors.

Members over the age of 18 may be given limited voting rights on committees.

Only committee members, the head teacher and the committee clerk have a right to attend committee meetings; as with GB meetings, the committee can invite other people to attend if it wishes. Committees must report back to the full GB. Delegated decisions taken by a property constituted committee are classed as being made by the whole GB, which remains the accountable body.



It is a good idea for new members of the board to attend a meeting of each committee so that they can get a good overall picture of how the GB works.

## Conduct

All GB's should adopt a code of conduct in order to establish and agree a corporate

understanding of the role and responsibilities of board members. You may be asked to sign one when you join a GB.

## Participation

To be a truly effective GB, all members should be encouraged to take a full and active part in the meeting. As a new board member, it may take a couple of meetings before you feel confident enough to join in fully, especially if you feel that your question may reveal how little you know about the topic under discussion. However, there is a real role for the 'intelligently naive' question, which often reveals that others are also struggling to understand the issue or that there is an alternative angle which may not have been considered. Your mentor will be able to encourage you. It is important to remember that your questions are valid no matter how basic you think they may be.

## 4.7 Task and finish/working groups

A task and finish group (TFG) (sometimes called a working group) is a small group of board members who carry out piece of work (the task) and when the task is finished, report back. Some matters can be more appropriately dealt with by these groups, especially where a quick resolution is needed. However, TFGs cannot be given delegated powers to make decisions. It is usual for a TFG to report recommendations to the committee from which its members are drawn or to the full GB.

## 4.8 SEND governor

All GB's have specific legal responsibilities for pupils with special education needs and disabilities (SEND). They must ensure that the GB is aware of, and fulfils its responsibilities for, special education. Your GB may wish to appoint a specific SEND governor who has responsibility for liaising with the school's SEND co-ordinator (SENCO).

## 4.9 Safeguarding governor

GB's must promote the welfare of children and are accountable for ensuring that their school has effective child protection policies in place that meet local and national guidance. As part of that obligation governors must consider any safeguarding guidance. There is an expectation on GB's to allocate a board member with leadership responsibility for the school's safeguarding arrangements. This governor will champion child protection issues, liaise with the designated safeguarding lead in the school (which may be the head teacher), and provide information and reports to the GB.

The safeguarding governor should not take the lead in dealing with any allegations of abuse - indeed no individual board member, or the GB, has an automatic role in dealing with individual cases of abuse or a right to know details of such cases (except when exercising their disciplinary functions in respect of allegations against a member of staff). Where an allegation is made about the headteacher, the chair should take the lead.

## 4.10 Committee chairs

Each committee of the GB must have a chair. The committee chair's responsibility is to liaise with the clerk to the committee to compile the agenda for meetings and ensure members have sufficient information to discuss issues and reach decisions. The chair leads the discussions and ensures that the decisions of the committee are conveyed back to the full GB.

It is not good practice for the GB chair to take on additional responsibilities as chair of a committee.

Test your knowledge	
1	Do you understand how your GB delegates responsibility and what your role is?
2	Do you know which members of your GB have particular responsibilities and what these are?
3	Have you agreed with your chair what is expected of you in your governance role and has this been recorded in writing?
4	The chair of the GB can always exercise all the functions of the board. True or false?
5	What happens at GB meetings and why are they important?
6	How will you ensure that you participate effectively in meetings of your GB?
7	Are there any governance matters you can discuss outside GB meetings?
8	Have you worked out how much time you think you will need to prepare for a GB meeting?
9	Does your GB have a code of conduct and do you understand it?
10	Can you describe how the GB of your school delegates its functions and what document(s) records this?



# 5 Knowing your school – finance and staffing

This chapter will cover:

- Types of funding
- Jersey Premium
- Primary PE and sport premium
- Universal infant free school meals
- The school budget and financial management
- Teachers' pay and conditions
- Your role in performance appraisal
- Your role and performance appraisal
- Professional standards
- Employment checks

## 5.1 What types of funding are there?

There are two major types of school funding; revenue funding and capital funding. Revenue funding pays for the day-to-day running costs of the school: staff salaries, stationery, heating and lighting bills. Capital funding is money provided for spending on school buildings and major items such as IT equipment. This funding may not be spent on the day-to-day running costs of the school or on routine maintenance.

In addition to central funds from SoJ, JCG, JCP, VCJ and VCP receive income from levied fees.

## 5.2 Jersey Premium

The introduction of Jersey Premium has enabled Island schools to review their approach to teaching and learning, ensuring that all pupils are able to achieve to the very best of their ability.

Available evidence demonstrates that a significant proportion of pupils who are eligible for Jersey Premium, don't go on to achieve at the levels that would normally be expected for their ability. Jersey Premium funding has therefore been targeted at raising the educational attainment and personal aspirations of all eligible pupils, across the full ability range.

Jersey Premium is a targeted funding programme for schools to help all children get the very best from their education. Schools will receive extra funding calculated on the number of eligible children they have each year. The funding is designed to ensure that all pupils receive high-quality teaching based on a detailed understanding of their needs or barriers to learning.

Schools will need to demonstrate that they have used their Jersey Premium budget to make a measurable difference to the learning and educational outcomes of their eligible pupils.

Schools will receive Jersey Premium funding on a per pupil basis for:

- pupils who have ever been Looked After Children (LAC)
- pupils who live in a household which has claimed Income Support
- pupils who live in a 'Registered' household that would otherwise be eligible to claim income support, except that they have not yet lived in Jersey for five years continuously.

The GB must ensure that the Jersey Premium funding is spent effectively to close the



attainment gap between disadvantaged pupils and their better off peers.

A strategy for the school's use of Jersey Premium must be placed on the school's website detailing:

- the amount of Jersey Premium money allocated for the current year
- a summary of the main barriers to educational achievement faced by eligible pupils at the school
- how the school intends to spend the funding to target those barriers and why
- how the impact will be measured and the next review date of the Jersey Premium strategy
- how the previous year's allocation was spent and the impact it has had on the attainment of disadvantaged pupils.

Jersey Premium applies to both fully and partially maintained schools.

### 5.3 The school budget

The GB of both fully and partially maintained schools has a responsibility for the financial management of the school, which includes deciding (in consultation with the head teacher) how the delegated budget is spent. As part of its strategic role, the GB must set the educational and financial priorities for the school and ensure the budget is managed effectively. The budget should be aligned to the school's key priorities as set out through your strategic planning. GB's need to ensure that they are using all their resources as effectively and efficiently as possible.

Once the budget has been set, the GB should monitor spending regularly throughout the year to check for overspends and underspends. More detailed monitoring of the budget can be delegated to a committee, but the whole GB should receive regular reports on the budget.

### 5.4 Knowing your staff

The GB is responsible for the conduct at the school and promoting high standards of educational achievement. This depends on the staff in the school meeting the targets and plans set out in the school's development/implementation plan (SDP/SIP). While the GB will not necessarily have close contact with the majority of the staff, it should always seek to develop an open, honest, and constructive working relationship with them. Subject or year link governors can play a part in this.

The staff should be encouraged to contribute to the development of the SDP. Staff governors can play a key role in promoting and developing good relationships between the GB and the staff. Governors can foster good relations through school visits and attending school functions.

Those members of staff who are not on the GB can be invited to meetings to report on specific issues. They may also be invited to attend committee meetings and working parties where appropriate.

GB's need to ensure that they receive appropriate information from their head teacher about the appraisal process.

Staff are a vital resource in any school and without the right staff the GB's strategy for school improvement cannot be achieved. The GB needs to ensure that its staff-related policies are based on a solid foundation of employment and equalities legislation and support, and develop and reward staff as well as providing a robust framework for tackling problems when things go wrong.

### Professional standards for headteachers

The DfE of England has also produced national standards of excellence for headteachers. This advice is non-statutory and can be used by GB's to assist them when reviewing the performance of the headteacher.

## Disclosure and Barring Service (DBS) and other pre-employment checks

When appointing staff, schools must undertake and record relevant employment checks.

These checks are used to establish:

- the appointee's identity
- that they meet all relevant staff qualifications
- their right to work in the UK/Jersey.

GB's must obtain a certificate for an enhanced criminal records check from the DBS with barred list information for appointees engaged to work in regulated activity. Amendments to the School Staffing (England) Regulations 2009 made in 2013 also require a GB to check that any person to be appointed to work as a teacher is not subject to a prohibition order issued by the secretary of state using the Employer Access Online service. The School Governance (Constitution) (England) Regulations 2012 were amended in 2016 to require all governors in maintained schools to have an enhanced DBS check.

<b>Test your knowledge</b>	
1	Do you know what your school budget is for the current year and how this figure is calculated?
2	What does your GB need to do in relation to Jersey Premium?
3	How does your GB ensure that it fulfils its core function to "oversee the financial performance of the organisation and make sure its money is well spent"?
4	Do you understand the staffing structure and profile of the school(s) you govern?

# 6 Knowing your school - education, data and improvement

This chapter will cover the following:

- How to use different sources of data to drive school improvement
- The school curriculum
- Information for secondary school governors and trustees about qualifications
- Assessment and statutory testing

## 6.1 Data

There is a wealth of information and data available to governors, parents and the public about schools. Jersey Reviewers question governors about their knowledge of the data relevant to their school, especially achievement, attainment and attendance. Governors must be familiar with this data and make good use of it in determining the progress a school is making.

In addition to the data sources detailed below, GB's should also be receiving in-school summative assessment data from senior leaders on a regular basis. Governors need to ensure they scrutinise this information carefully and ask challenging questions about any areas of underperformance.

“For governors to carry out their statutory function, it is essential that they have as many sources of information as possible. Data is already there for schools and we are not asking the staff to do any extra work. We should feel empowered to ask for as much information as possible to help us carry out our role effectively.”

## 6.2 Analyse School Performance

The CYPES Insight Team gives information to:

- compare the progress/attainment in one school with the local and England average
- 

- focus in depth on the attainment and progress of disadvantaged pupils
- test hypotheses about the performance of different pupil groups or subjects
- plot scatter graphs comparing the performance of different pupil groups in specific areas
- gather data on attendance and exclusion rates in their school(s).

The aim is to improve teaching and learning by enabling a greater depth of analysis and establishing a common set of analyses for schools. Most governors will not need to look at the full suite of data in any great detail, but it is advisable that at least some of those governing (ideally the committee with responsibility for standards) have access to and can understand how to interpret the information it is possible to request reports which can be used to facilitate challenge and support in board and committee meetings.

## 6.3 Curriculum and assessment

GB's must ensure that the school has a broad and balanced curriculum, which promotes the spiritual, moral, cultural, mental and physical development of pupils, and prepares them for the opportunities, responsibilities and experiences of adult life.

Jersey Reviewers will consider whether the school curriculum is broad and balanced and how well leaders, including governors, ensure this is the case.

While the GB may not have professional teaching expertise, it can and should ask

searching questions if changes to the curriculum offer are suggested. For example, if the professional leadership of the school recommends changing the curriculum offer so that the range of GCSE subjects is reduced, the GB needs to ensure that this is in the best interests of the pupils at the school.

The Jersey Curriculum 2014 is the definitive guide to see what should be on offer for every pupil.

## 6.4 Qualifications

Governors of secondary schools should be aware of the options available to students once they reach 16 so that they can ensure students are well prepared when they leave. This does not mean that pupils must stay on at the same school (if it has a sixth form), although this is an option. The alternatives include:

- continuing in full time education at Highlands College
- undertaking an apprenticeship or traineeship or direct employment
- transferring to Hautlieu ('A' levels, IBDP + IBCP), JCG ('A' levels and BTec) or VCJ ('A' levels and BTec).

It is important to offer courses that are valued by employers, either GCSEs or vocational qualifications. KS4 qualifications were recently reformed. These new GCSEs follow a new grading structure (9-1 instead of A\*-G) and are intended to be more robust. New GCSE courses in English and maths were introduced in September 2015 and the first exams took place in 2017. For the 2018 summer results, roughly half of all GCSEs were

'reformed' and by summer 2020, all GCSEs will be reformed. Until this time, year 11 students will receive a mixture of numerical and lettered grades and those governing will need to be familiar with both the 9-1 and A\*-G grading systems.

The UK government has reformed vocational qualifications as it did not think the standard of the qualifications was high enough. It has also vastly reduced the range of vocational qualifications included in school performance tables. Knowing whether a qualification is equivalent to a GCSE under the new guidelines about vocational qualifications is a good start to knowing whether it will be accepted. Information can be found at [www.education.gov.uk](http://www.education.gov.uk)

The government has also made several changes to A-levels. Reformed A-Levels were introduced for first teaching in September 2015 (for some subjects in September 2016). They are fully linear with all exams taken at the end of year 13. The AS-level no longer counts towards the overall A-level grade, but will be retained as a standalone qualification.

## 6.5 Assessment and statutory testing

Assessment is carried out throughout pupils' school lives; teachers will continually assess how pupils are progressing. In addition, formal assessments are carried out at various key stages. The SoJ sets the level of achievement that pupils are expected to reach at the various stages. The GB has a joint responsibility with the headteacher to ensure formal assessments are carried out.

The table below shows the current formal assessment procedure from foundation to KS4.

Key Stage (KS)	Age assessment carried out	Type of Assessment
Foundation	4/5 (Reception)	Teacher Assessment
KS1	6/7 (year 2)	Teacher Assessment
KS2	10/11 (year 6)	Teacher Assessment, KS2 tests in English and mathematics, CAT4
KS3	13/14 (year 9)	Teacher Assessment, KS3 tests in English and mathematics, CAT4
KS4	15/16 (year 11)	GCSE/approved equivalent qualification

GB's are responsible for promoting high standards of educational achievement, and to do this they need to understand how children are progressing well before they are formally assessed. Schools are free to decide what system they use to track pupils' progress within the school. The GB's role here is to challenge senior leaders so that they are confident the chosen system is robust, manageable in terms of workload and understood by all.

The GB must receive regular reports about the progress of the children in the school; it needs to have a clear understanding of whether the pupils will make expected progress and, if not, what is being done to address this. In addition, governors should receive information from the headteacher about the expected results at the end of the key stage, and if pupils do not achieve the expected results governors must be prepared to ask searching questions about whether the assessment processes used in school are accurate.

These questions can be difficult, but governors need to remain focused on the fact that their primary concern is for the best interests of the children in their school.

## 6.6 Minimum standards

The SoJ sets minimum standards that it expects schools to achieve.

These standards do not apply to special schools or the alternative curriculum provision.

### Secondary standards

These minimum standards are based on the Jersey 8 measure. This is calculated from a pupil's progress across eight subjects, including English, maths, high-value academic, arts and vocational qualifications from the SoJ approved list.

Secondary schools will fall below the minimum standard if pupils make an average of half a grade less progress than expected across these eight subjects, unless the

confidence interval (a statistical measure of uncertainty) suggests that the school's underlying performance may not be below average.

### Primary minimum standards

Primary schools are judged by both attainment and the progress pupils make between key stages. A primary school is deemed above the minimum standards if:

- at least 65% of pupils achieve the expected standard in reading, writing and mathematics
- or
- the school achieves sufficient progress scores in all three subjects: at least -5 in reading, -5 in mathematics and -7 in writing.

Sufficient progress is calculated using a value-added measure from KS1 to KS2.

Test your knowledge	
1	How does your GB ensure that the school has a broad and balanced curriculum? Do you have any particular role in relation to this?
2	If relevant, what qualifications does your school offer its young people?
3	What formal assessments are carried out in your school and why?
4	What are the minimum standards for your school and where is your school in relation to them?
5	How do you know if your school's self-evaluation is accurate? Why is this important?
6	Do you know what your school's improvement priorities are for the current year?
7	The GB is responsible for holding the school to account for the attainment, attendance and progress of all of its pupils. Do you know what data your GB receives/accesses to monitor these, and how you personally can access appropriate data?

# 7 Holding the school to account

This chapter will cover the following:

- Governing and the Jersey Schools Review
- How the school will be reviewed
- Headteacher reports
- Visiting the school

## 7.1 GB's and Jersey Review

The Jersey Review is the body designated by SoJ to review all of the schools.

There is one type of review that is relevant for schools:

- Full reviews are conducted over two days, which result in a full set of graded judgements. There is a safeguarding review the day before.

The inspectors judge the overall effectiveness and efficiency of the school, the quality of leadership and management at all levels and the effectiveness with which the GB's carry out their responsibilities. Reviews are normally carried out at short notice. The Jersey Review grades the provision in each area of the school on a four point scale: 'outstanding', 'good', 'fair' and 'requires significant improvement'. The Jersey Review framework focuses on four main areas:

- achievement
- behaviour, personal development and welfare
- the effectiveness of teaching
- the effectiveness of leadership and management.

There is a particular emphasis on the quality of teaching within schools.

Governance is judged as part of leadership and management and does not receive a separate grade.

## The review

As part of the review process, the reviewers will expect to speak to as many members of the GB as possible. The reviewers will look at

how well the GB evaluates the performance of the school, particularly in terms of; pupil progress; the leadership of teaching; the management of staff; safeguarding; and the difference made by initiatives such as Jersey Premium.

At the end of the review process, the reviewers will hold an oral feedback session in which they will inform the school of their provisional findings.

## GB's responsibilities in the inspection process

The GB:

- is responsible for the conduct of and standards in the school
- should ensure that parents are notified when it is informed that a review is to take place
- should ensure as many members of the GB as possible are available to speak to reviewers
- should ensure that at least one member of the GB attends the feedback session if so desired by the Head teacher.

## How often will the school be reviewed?

Following on from the final pilot in the autumn term of 2018, schools will enter into a three-year review cycle.



Reviewers may identify concerns about a school. Such a school will have an appointed School Support Board. The School Support Board will meet at least once a term, the lead reviewer will conduct a one day review in advance of each School Support Board meeting and the school's progress will be closely monitored.

## 7.2 Headteacher reports

Part of the role of the headteacher is to provide the GB with the information it needs to do its job well. The governors' role is largely strategic and the headteacher has responsibility for the operational day-to-day management of the school. One of the key aims of the report is to help the GB to maintain a strategic focus, and the report format needs to reflect this.

Headteacher reports differ hugely in both content and form, but ideally will be closely linked to the strategy for achieving the school's vision, as agreed by the GB. This will include headline targets linked to the key priorities and objectives that form the strategy as well as the progress towards achieving these targets with supporting data to evidence the judgments being made.

The sample template specifically states that the report might include data on:

- pupil learning and progress
- pupil applications, admissions, attendance and exclusions
- staff deployment, absence, recruitment, retention, morale and performance
- the quality of teaching.

Any strategy must be resourced, so the head's report also needs to include details of the agreed budget. It is important to know whether actual expenditure matches the budget plan, and if forecasts for day-to-day running expenses are accurate, as well as if costs for specific improvements or interventions are adequate. Likewise, knowing that the staffing structure is working well, with happy staff who are getting better at their jobs, and who are

driving up performance, is crucial for sustained school improvement.

There are a range of other issues that heads will need to report on. These may concern compliance with key policies such as safeguarding and issues around premises and health and safety. The amount of detail needs to be agreed, but termly reports of things like incidents of bullying will need to be contextualised with trends.

## 7.3 Visiting the school

In order to carry out its role effectively, the GB needs to have a good understanding of its school. One way in which governors can get to know their school is to visit it during the day and talk to staff and pupils to find out what actually happens in and around the classrooms. Well-planned, effective school visits are invaluable in aiding understanding of how issues discussed at board level translate into the everyday life of the school. It should be noted that those on the GB do not have the right to visit the school unannounced; visits must always be prearranged with the head.

Those governing are not Jersey reviewers: a governance visit should be to learn about the school in ways that help board members determine and monitor the priorities for the school. Governors must not make judgments about the professional expertise of the teachers.

GB's should have a policy on the purpose and management of governance visits as part of their monitoring role. The policy should be discussed with school staff before it is introduced. Some schools appoint link governors to a number of different areas including training, subjects and year or class, whereas other boards assign governors to improvement areas such as a particular curriculum area or policy initiative.

Appointing a named (link) governor does not absolve the GB of its responsibilities for these issues. The GB should ensure that such issues are covered on the agenda of the full GB



meeting and all members of the GB have an understanding of the strengths and weaknesses of the school in relation to these matters.

A new governor should discuss with the chair how to fit in to the existing structure. Members of the GB may also visit to observe how a particular issue is dealt with on a day-to-day basis, such as behaviour, provision for ICT, boys' achievement etc. The focus of visits for the coming term, and who will conduct them, should be agreed at the GB meeting, taking into account the school's strategic priorities.

### Before the visit

- GB or committee meetings should regularly discuss the purpose of the next round of visits, and how the visits will link with the board's monitoring role. It can be useful to think of the GB as 'commissioning' the visit and delegating responsibility for carrying it out to individual governors'.
- Arrange with the head a mutually convenient time, avoiding sensitive times such as exam or assessment periods.
- Discuss the visit with the headteacher and ensure that any member of staff who will be involved in the visit understands the arrangements.

### During the visit

- Present yourself in a way that matches the professionalism expected of school staff.
- Report to reception and follow the procedures for visitors. Even those familiar with the school should do this.
- Keep to the role agreed: get involved with the pupils' activities when invited, but do not intervene, and only enter classrooms and other areas of the school following invitation by a member of staff.
- Never comment on the teacher's conduct of the lesson or on individual pupils.

- Be courteous and professional throughout the visit, and be flexible if something urgent crops up. Always keep in mind that the education of the students is of overriding importance.
- Remember that you are representing the GB as a whole and do not express your own opinions when pressed on controversial issues.

### After the visit

- Share any concerns, however trivial, with the chair and the headteacher. Make notes while the visit is still fresh in your mind.
- Never make comments about individual children; if you have concerns, discuss them privately with the headteacher and chair.
- Remember that monitoring staff performance is the role of the headteacher, not the GB.
- Prepare a brief report of your visit and share the draft with the member of staff and the head.
- Taking their comments into account, prepare a final brief report to be circulated to the GB before the next meeting.
- Take time to reflect on the visit, thank the staff involved and consider anything you might do differently in future visits.

Test your knowledge	
1	Why is the headteacher's report to the GB so important? Have you seen the last report?
2	What are your plans to visit the school? What will you do before a visit to ensure that it is effective and properly conducted? What do you think you can learn from a visit to your school that you are unlikely to learn otherwise?
3	Do you know how to find out about the profile, behaviour and attitude to learning of pupils in your school?
4	How does your GB ensure that it knows the school staff?
5	How can your GB find out what parents and carers of children at your school think about it? Do you know what they think?

# 8 Pupils and parents

This chapter will cover:

- Special educational needs and disability
- Gifted and talented
- The Equity Act 2010
- Health and safety
- Safeguarding and child protection
- Admissions and exclusions
- Complaints
- Data protection

## 8.1 Knowing your pupils

Knowing your pupils is about listening to the views of pupils and trying to understand their point of view. It's an important part of being a governor and will help to focus the work of the GB on the majority of the school's population i.e. children and young people. It will also allow you to assess the impact of all those policies, projects and procedures that aim to improve school life.

The Jersey Review suggests that in 'outstanding' schools leaders have a deep, accurate understanding of the schools effectiveness informed by the views of pupils. Being aware of the views of pupils helps GB's facilitate better communications and cooperation in schools.

The views of your pupils can influence their experience of education and have significant effects on their overall levels of attainment. Understanding these views, collectively and individually, can therefore help school leaders tackle serious underlying issues, such as persistent absence and bullying. Research shows that acting on pupil feedback contributes to better engagement with learning, increased motivation and self-confidence.

Given the benefits of listening to and acting on pupils' views, GB's should know what activities and resources are available to

effectively gather pupils' views and how that information can be used to inform their work.

## 8.2 Special educational needs and disability

A child or young person has special educational needs and disability (SEND) if s/he has a learning difficulty or disability which calls for special educational provision to be made for her or him. A child of compulsory school age or a young person has a learning difficulty or disability if s/he:

- has significantly greater difficulty in learning than the majority of others of the same age, or
- has a disability which prevents or hinders her or him from making use of facilities of a kind generally provided for others of the same age in mainstream schools or mainstream post-16 institutions.

The special needs of many children are met by the school without outside intervention. However, for some children it is necessary to apply for a formal statutory assessment of their needs.

The SEND code of practice sets out responsibilities and expectations for school governors and classroom practitioners in relation to children with SEND.

Schools must appoint a designated teacher as the special educational needs co-ordinator (SENCO), who is responsible for the day-to-day operation of the school's SEND policy. S/he will co-ordinate provision for pupils with SEND and liaise with parents, staff and external agencies.

### 8.3 Gifted and talented pupils

Gifted and talented learners are defined as those who have one or more abilities developed to a level significantly ahead of their year group (or with the potential to develop those abilities). 'Gifted' describes learners who have the ability to excel academically in one or more subjects such as English, maths or science. 'Talented' describes learners who have the ability to excel in practical skills such as sport, leadership, artistic performance or in an applied skill.

The role of governors is to ensure that systems and programmes are in place for identifying and developing gifted and talented pupils.

### 8.4 The Equality Act 2010

GBs are subject to the Equality Act 2010 in two ways: first by the main provisions of the Act, which relate to all employers (ie the basic provisions that outlaw discrimination) and second by the distinct public equality duty, which applies only to public bodies.

The Act sets out the basis on which people are protected from discrimination. There are nine categories, known as 'protected characteristics'. These are: age; disability; gender reassignment; marriage and civil partnership; pregnancy and maternity; race; religion and belief; sex; and sexual orientation. The public equality duty requires that in exercising its functions a public body must:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act

- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it
- foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

In meeting their obligations under the Act, GBs need, among other things, to consider how they can remove or minimise disadvantages suffered by people as a result of their protected characteristics.

The Act explains that having due regard for advancing equality involves:

- removing or minimising disadvantages suffered by people due to their protected characteristics
- taking steps to meet the needs of people from protected groups where these are different from the needs of other people
- encouraging people from protected groups to participate in public life or in other activities where their participation is disproportionately low.

### 8.5 Health and safety

Despite the many stories that circulate about health and safety, the actual practice is relatively simple. The GB has a responsibility to ensure that neither pupils nor employees are put at unnecessary risk while at school or on school business. Governors must ensure that Jersey's policies on health and safety are being followed. However, it is not the governors' role to undertake health and safety inspections themselves; this should be left to the professionals.

### 8.6 Safeguarding and child protection

GB's must promote the welfare of children and are accountable for ensuring that their school has effective child protection policies in place that meet Jersey guidance.

This guidance places an expectation on schools to have a senior board-level lead to take leadership responsibility for the organisation's safeguarding arrangements. This member of the board champions child protection issues, liaises with the senior member of staff designated as the safeguarding lead in the school (which may be the headteacher), and provides information and reports to the GB.

The GB needs to ensure that a child protection policy and a staff behaviour policy are in place. The Jersey Review in assessing the quality of leadership and management, will inspect schools' approaches to safeguarding so GB's must ensure not only that the relevant policies are in place, but also that they are being effectively implemented and monitored.

### Safer recruitment

The GB must ensure that potential (and current) employees are subject to appropriate checks to confirm their suitability to work with children. The school's recruitment and selection procedures should be included in a written policy which also outlines the suitability checks that potential employees will be required to undergo. In reality, Jersey's HR department ensures strenuous checks are made.

### Prevent

Under section 26 of the Counter Terrorism and Security Act 2015, GB's must have "due regard to the need to prevent people from being drawn into terrorism". The Prevent strategy sets out the policies and procedures GB's should ensure are in place to combat extremism in schools. GB's should consider their Prevent duties in the context of the school's wider safeguarding responsibilities, as opposed to something entirely separate. Governors should:

- Ensure that the risk of young people being drawn into terrorism in their school has been assessed.

- Ensure that the school has a robust safeguarding policy that is in line with Jersey's policies and procedures. The policy should look to protect young people from being exposed to extremist views that promote or support terrorism. It should also set out an appropriate response to any perceived risk, identify appropriate avenues for referring any concerns and set out clear protocols for vetting visitors and speakers.
- Ensure that the right staff have training to identify children at risk of being drawn into terrorism and to challenge extremist views. Appropriate staff should also be given Prevent awareness training.
- Ensure that there are appropriate systems to monitor and filter extremist content when the internet is accessed on the school system.

Work to implement the Prevent duty should take place in the context of schools' existing duty to promote fundamental Jersey and British values of democracy, the rule of law, individual liberty, and mutual respect and tolerance of different faiths and beliefs.

## 8.7 Admissions and exclusions

### Admissions

Parents apply to the CYPES admissions team, who then seek places for those pupils based on the preference list submitted by the parent. If the school in question has places, it must admit the child.

Where an applicant is refused a place because they do not meet the relevant oversubscription criteria, they may appeal the refusal to an independent admissions appeals panel.

Admissions to selective and/or fee paying schools have slightly different arrangements.

## Exclusions

Only the headteacher or acting headteacher of a school can exclude a pupil for a fixed period or permanently. The GB must review certain exclusion decisions made by the headteacher, including where the exclusion is permanent, and it will usually appoint a panel of governors to carry out this function. Regulations also allow parents to appeal to the GB against fixed-term exclusions. When reviewing the exclusion, governors may decide that the pupil should be reinstated.

For permanent exclusions, if still not satisfied, parents can appeal to the Jersey independent review panel which can uphold the exclusion decision, recommend that the GB reconsider their decision or quash the decision and direct that the GB considers the exclusion again.

## 8.8 Knowing your parents

### Information for parents

Schools are required to publish certain information on their website. Exactly what needs to be published will include:

- a statement about the school's ethos and values
- the curriculum the school offers
- the behaviour policy
- a report on the provision for children with SEND
- the admission arrangements (or, if the school is not the admission authority, where these can be accessed)
- the Jersey Premium strategy including the amount the school receives in Jersey Premium, how that has been spent, and the impact it has had.

This information must be supplied in paper copy if requested by parents. Minutes of meetings must be made available to those who wish to view them. Many schools also produce a prospectus that includes much of the same information as published on the school's website.

As well as statutory communications, many schools also issue termly newsletters to inform parents of the school's activities.

### Views from parents

In order to govern effectively, boards need to know their schools: this is one of the elements of effective governance. Engaging with parents is an excellent way for governors to get to know their school's strengths and weaknesses and its community. A GB will want to solicit the views of parents to inform its strategic planning and give parents the opportunity to help shape their child's education, as well as being reflective about school performance and its own effectiveness.

### Parent councils

It is for the GB to decide whether it wishes to create a council. A parent council is a mechanism for seeking views; as an advisory body it has no decision-making powers. These remain the responsibility of the GB.

### Complaints

The GB is responsible for ensuring that the school has a procedure for dealing with complaints. The GB must publish its complaints procedure and schools must make clear to parents where they can find it.

Most school complaints procedures have a staged process by which the complaint can be escalated up the chain of command. The first stage is where a concern is raised directly with a member of the school staff. The second stage is a formal complaint to the headteacher. The final stage is for the GB to appoint a panel to deal with the complaint.

## 8.9 Data protection

The GB has overall responsibility for matters relating to data protection. From May 2018, schools must comply with the General Data Protection Regulations (GDPR) when handling "any information relating to an identified or identifiable natural person"; this includes

personal information belonging to pupils, staff and parents.

The GDPR replaces the previous Data Protection Act, increasing possible sanctions for non-compliance while strengthening existing rights for individuals.

GBs will need to ensure that suitable data protection policies and procedures are in place that have regard to obligations under the GDPR. The GB should seek assurances that relevant staff receive GDPR training and policies and procedures which relate to the processing and record management of data are reviewed accordingly.

<b>Test your knowledge</b>	
1	Why is it important for your GB to seek the views of pupils?
2	How does your GB ensure that the special needs of all children and young people are met? Does anyone have specific responsibility for oversight of SEND and other arrangements?
3	What in general terms should your school's child protection and behaviour policies cover? Have you been given access to them?
4	Do you know what the Prevent strategy is and how your school is complying with this?
5	Can you identify three examples of how your GB has effectively engaged with parents?



# 9 Further resource

## 9.1 Model governor role description

### Role of a school governor

To contribute to the work of the GB in ensuring high standards of achievement for all children and young people in the school by:

- setting the school's vision, ethos and strategic direction
- holding the headteacher to account for the educational performance of the school and its pupils
- overseeing the financial performance of the school and making sure its money is well spent

Chair \_\_\_\_\_

Vice chair \_\_\_\_\_

Clerk \_\_\_\_\_

Buddy/mentor \_\_\_\_\_

Activities. As part of the GB team, a governor is expected to:

1. Contribute to the strategic discussions at GB meetings which determine:
  - the vision and ethos of the school
  - clear and ambitious strategic priorities and targets for the school
  - that all children, including those with special educational needs, have access to a broad and balanced curriculum
  - the school's budget, including the expenditure of the Jersey Premium allocation
  - the school's staffing structure and key staffing policies
  - the principles to be used by school leaders to set other school policies.
2. Hold the senior leaders to account by monitoring the school's performance; this includes
  - agreeing the outcomes from the school's evaluation and ensuring they are used to inform the priorities in the school development plan
  - considering all relevant data and feedback provided on request by school leaders and external sources on all aspects of school performance
  - asking challenging questions of school leaders
  - ensuring senior leaders have arranged for the required audits to be carried out and receiving the results of those audits
  - ensuring senior leaders have developed the required policies and procedures and the school is operating effectively according to those policies
  - acting as a link governor on a specific issue, making relevant enquiries of the relevant staff, and reporting to the GB on the progress on the relevant school priority
  - listening to and reporting to the school's stakeholders: pupils, parents, staff, and the wider community, including local employers.



3. Ensure the school staff have the resources and support they require to do their jobs well, including the necessary expertise on business management, external advice where necessary, effective appraisal and CPD (continuing professional development), and suitable premises, and that the way in which those resources are used has impact.

The role of a governor is largely a thinking and questioning role, not a doing role.

A governor does NOT:

- write school policies
- undertake audits of any sort - whether financial or health and safety - even if the governor has the relevant professional experience
- spend much time with the pupils of the school - if you want to work directly with children, there are many other valuable voluntary roles within the school
- fundraise - this is the role of the PTA, the GB should consider income streams and the potential for income generation, but not carry out fundraising tasks
- undertake classroom observations to make judgments on the quality of teaching - the GB monitors the quality of teaching in the school by requiring data from the senior staff and from external sources
- do the job of the school staff - if there is not enough capacity within the paid staff team to carry out the necessary tasks, the GB needs to consider and rectify this.

As you become more experienced as a governor, there are other roles you could volunteer for which would increase your degree of involvement and level of responsibility (e.g. as a chair of a committee). This role description does not cover the additional roles taken on by the chair, vice chair and chairs of committees.

In order to perform this role well, a governor is expected to:

- get to know the school, including visiting the school occasionally during school hours and gaining a good understanding of the school's strengths and weaknesses
- attend induction training and regular relevant training and development events
- attend meetings (full GB meetings and committee meetings) and read all the papers before the meeting
- act in the best interests of all the pupils of the school
- behave in a professional manner, as set down in the GB's code of conduct, including acting in strict confidence.