

Model Governing/Trust Board Year Planner

School Term	Core Function 1: Ensuring clarity of vision, ethos and strategic direction	Core Function 2: Holding the headteacher to account for the educational performance of the school and its pupils	Core Function 3: Overseeing the financial performance of the school and making sure its money is well spent	Governing/Trustee Board's organisational efficiency and effectiveness
Autumn	<ul style="list-style-type: none"> Evaluate what was achieved last year – overview of public examination/national test results Review the aims/vision statement Agree focus priorities for the year – review the SDP/SIP Approve the SDP/SIP 	<ul style="list-style-type: none"> Review headteacher and deputy performance and pay Ensure every teacher has an appraisal and salary review Review performance data, including SATs/GCSE/A Level results and Ofsted and FFT dashboards Agree school performance targets including attendance (good practice) Monitor data on attendance/absence, pupil exclusion, racist incidents etc. (usually in the second part of the term) Receive report on safeguarding through headteacher's report (designated governor/trustee report – annual requirement but not statutory; it may not be this 	<ul style="list-style-type: none"> Publish details of use of pupil premium and its impact (sports premium – primary schools only) Review whole school pay policy Publish admissions arrangements for autumn of the next year (schools which are admission authorities) Prepare income and expenditure returns Receive budget monitoring reports Complete asset management plan and school capacity review Review charging and letting policy Benchmarking 	<ul style="list-style-type: none"> Elect chair and vice chair (committee chairs can be elected at the Governing/Trustees Board meeting or at individual committees) Appoint clerk (review arrangements for clerking) Appoint clerks to committees or agree to delegate this to each committee Review the Scheme of Delegation and committee structure (including terms of reference) and membership Update register of pecuniary interests Ensure school website includes all information required by DfE including governance arrangements

		<p>term)</p> <ul style="list-style-type: none"> • Ensure that the Governing/Trustees Board directed the school staff to read the updated version of Keeping Children Safe in Education (KCSiE) 	<ul style="list-style-type: none"> • Consideration of Financial Regulations and Scheme of Delegation (it may not be this term but must be annually) • Familiarise yourself with the Academies Financial Handbook (academies only) • Appoint Auditors (academies only) • Approve year end accounts (academies only) • Agree internal audit programme (academies only) • Receive internal audit reports (academies only) • Receive external auditors report (academies only) • Report on Health & Safety • Review risk register (academies only) • Submit academy trusts' audited financial statements and auditor's management letter to EFA by 31 December (academies only) 	<p>(applies to maintained schools and academies)</p> <ul style="list-style-type: none"> • Plan the induction of new governors/trustees • Review Code of Conduct for Governors/Trustees • Review Standing Orders (if in place, not statutory) • Review Scheme of Delegation (SoD) for Local Governing Bodies and publish it on the trust's website (Multi Academy Trusts only) • Agree calendar of meetings against school calendar events (unless done in summer term) • Review roles and responsibilities of individual governors/trustees • Agree programme of governor/trustee visits • Set objectives for the Governing/Trustees Board linked to SDP/SIP • Review and plan to meet governors'/trustees' training needs • Ensure schedule in place to review all relevant policies throughout the year
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Spring	<ul style="list-style-type: none"> • Review progress of the SDP/SIP • Feedback on governors'/trustees' visits 	<ul style="list-style-type: none"> • Monitor pupil performance • Monitor performance management of the headteacher 	<ul style="list-style-type: none"> • Complete SFVS and send to the LA by 31 March (maintained schools only) • Review staff structure • Publish admissions appeals timetable (schools that are admissions authorities only) • Start drafting budget for the coming year (first part of the term; maintained schools only) • Receive budget monitoring reports • Approve budget (unless delegated to committee; maintained schools only) • Publish financial statements on the website by 31 January (academies only) • Review insurance • Review catering accounts • Make purchasing decisions for services from external providers where appropriate • Receive internal audit 	<ul style="list-style-type: none"> • Monitor Governing/Trustees Board performance • Review impact of Equality Objectives and update equality information • Approve residential trips

			reports (academies only) • Monitor Health & Safety	
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Summer	<ul style="list-style-type: none"> • Review progress of SDP/SIP • Start preparing/reviewing the SDP/SIP for the next academic year • Feedback on governors'/trustees' visits 	<ul style="list-style-type: none"> • Report to parents on the policy for children with SEN (not special schools) • Review appraisal policy (maintained schools – advisory for academies) • Review: <ul style="list-style-type: none"> i. Admissions and destinations of school leavers ii. Attendance of pupils and staff iii. Pupil exclusions for the year iv. Child protection policy and procedure • Receive report on safeguarding (unless done in autumn term) • Appoint governors/trustees to conduct headteacher's performance review – ensure appropriate training has been completed • Appoint an external adviser for headteacher's performance management (advisory for academies) 	<ul style="list-style-type: none"> • Agree and approve budget for the new school year (academies only by 31 July) • Complete and return budget template and Best Value statement (maintained schools only) • Complete and return Consistent Financial Report (CFR) declaration (maintained schools only) • Audit school fund • Review staff pay • Receive budget monitoring reports • Receive internal audit reports (academies only) • Consider proposals for writing off bad debts 	<ul style="list-style-type: none"> • Conduct self-review of the Governing/Trustees Board effectiveness • Prepare and publish an annual statement taking account of the outcomes of the self-review and including: <ul style="list-style-type: none"> i. The governance arrangements that are in place, including the remit of any committees; ii. The attendance record of individual governors at board and committee meetings; iii. An assessment of the effectiveness and impact of the board and any committees with details of any particular challenges that have arisen; • Review composition of Governing/Trustees Board for coming academic year and publish details of governance

				<p>arrangements on the website</p> <ul style="list-style-type: none"> • Approve term dates (if applicable) and INSET/non-pupil days • Agree calendar of meetings against the school calendar events (unless done in autumn term)
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Things to consider:

- Appointment of governors/trustees and local governors (as and when required)
- Annual General Meeting (AGM) – if stated in the Articles of Association (academies only)
- Appointment of replacement/additional Members (academies only)
- Skills audit