

**Governing Board Health Check**

Version 0.0.1

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## Governing Board (GB) Health Check

The [Maintained Schools Governance Guide](https://www.gov.uk/guidance/governance-in-maintained-schools) and the [Academy Trust Governance Guide](https://www.gov.uk/guidance/-governance-in-academy-trusts) outlines the features of effective governance. It also mentions the importance that the board regularly assesses their effectiveness.

This health check is a best practice tool, to support boards in the process of self-evaluation. The aim of the health check is to help boards review their governance arrangements, check that they have appropriate systems in place and identify areas where they could improve.

### Using the GB Health Check

The health check should not be overly burdensome; however, it is strongly recommended that an appropriate amount of time is set aside for the board to use this tool for it to be effective. It is also important, that board members should not feel inhibited about answering the questions honestly, as this will help to provide a realistic self-evaluation of the board’s effectiveness. It would also be beneficial to appoint at least one board member to lead the process, to collate documents and to ensure any actions are carried forward including organising any training identified.

We suggest the following process:

* board member identified as lead
* deadline for responses set
* date of board meeting to discuss responses agreed
* questionnaire sent to board members, including deadline for response and reminder of date of the meeting to discuss responses
* each board member completes the health check questionnaire, it may encourage board members to answer questions honestly if responses remain anonymous, only known to the lead. When completing, it is important to consider what evidence is known/available to determine the response on the scale as outlined below:
	+ Secure: you are confident that the practice/procedure is actively in place, and you have the evidence to support it
	+ Partially: you partially carry out the practice/procedure and you have some evidence to support it
	+ Not secure: You do not carry out the practice and you have little or no evidence
* lead collates summary of responses
* summary shared with board members seven days prior to meeting

The health check will help to identify areas that are working well and areas in need of development. Areas in need of development should form the basis of the board’s action plan (example, see page 7) and professional development.

### **Core area 1: ensuring clarity vision, ethos and strategic direction**

| **Question** | **Secure** | **Partially** | **Not secure** | **Evidence** |
| --- | --- | --- | --- | --- |
| * 1. Have the board set and reviewed the vision following consultation with a range of stakeholders i.e. pupils, parents, staff, wider community, Diocese etc?
 |  |  |  |  |
| * 1. Has the board agreed a strategy that contains priorities with key performance indictors; are priorities regularly monitored and reviewed?
 |  |  |  |  |
| * 1. Does the board’s strategic planning cycle drive its activities and agenda setting?
 |  |  |  |  |
| * 1. Does the board ensure decisions are made in line with the school’s vision and strategic priorities, and monitor the impact of these decisions?
 |  |  |  |  |
| * 1. Does the board monitor how effectively policies and related practices support the ethos of the school?
 |  |  |  |  |
| * 1. Do board members know what their statutory responsibilities are and how they are fulfilled?
 |  |  |  |  |
| * 1. Does the board ensure that the school’s curriculum, extra-curricular activities and ethos are preparing pupils for life in modern Britain?
 |  |  |  |  |

### **Core area 2: holding the headteacher to account for the educational performance of the school and its pupils**

| **Question** | **Secure** | **Partially** | **Not secure** | **Evidence** |
| --- | --- | --- | --- | --- |
| 2.1 Does the board access a range of performance information about the school, including:* the Inspection Data Summary Report (IDSR)
* Analyse School Performance (ASP)
* The Fischer Family Trust (FFT) governor dashboard (if the school subscribes)
* in-year progress tracking from the school
* secondary Schools, [Destination data](https://explore-education-statistics.service.gov.uk/data-tables#subjectTabs-createTable) and [guide](https://www.gov.uk/government/publications/how-to-use-destinations-data)
* external reports including notes of visits from school improvement partners or equivalent
* information from monitoring visits to school
 |  |  |  |  |
| 2.2 Do all board members understand the performance data in a way that enables them to properly hold school leaders to account? |  |  |  |  |
| 2.3 Is the board confident that performance management for all staff is conducted effectively, and that this contributes to improving outcomes for pupils? |  |  |  |  |
| 2.4 Is performance management of the headteacher/principle conducted effectively supported by an independent external adviser (for LA maintained schools), ensuring performance objectives contribute to improving outcomes and including mid-year review? |  |  |  |  |
| 2.5 Does the board have a clear understanding of how pay decisions are reached for all teaching staff in line with statutory and contractual requirements? |  |  |  |  |

### **Core area 3: overseeing the financial performance of the school and making sure its money is well spent**

| **Question** | **Secure** | **Partially** | **Not secure** | **Evidence** |
| --- | --- | --- | --- | --- |
| 3.1 Is the board confident that the school’s financial management systems are robust? |  |  |  |  |
| 3.2 Does the board access [financial benchmarking](https://financial-benchmarking-and-insights-tool.education.gov.uk/) information and use this to ensure the school is achieving value for money? |  |  |  |  |
| 3.3 Does the board regularly review the staffing structure to ensure that it meets the needs of the school and ensures good value for money? |  |  |  |  |
| 3.4 Have all the standards within the [schools financial value](https://www.westmorlandandfurness.gov.uk/schools-and-education/information-schools/school-finance-and-budgeting) standard been met? |  |  |  |  |
| 3.5 Does the board ensure that all available resources are allocated to school development priorities effectively? |  |  |  |  |
| 3.6 Is the pupil premium being used effectively, so that the school is diminishing the difference in achievement between pupil premium pupils and their peers? |  |  |  |  |

### **Core area 4: effective governance**

| **Question** | **Secure** | **Partially** | **Not secure** | **Evidence** |
| --- | --- | --- | --- | --- |
| 4.1 Does the board keep its size and structure under regular review to ensure it supports effective and efficient working? |  |  |  |  |
| 4.2 Does the board conduct a regular [skills audit](https://www.nga.org.uk/Knowledge-Centre/Good-governance/Effective-governance/Governing-Board-Self-Review-%281%29/Skills-Audit-and-Skills-Matrix.aspx) and use the analysis to inform governor recruitment and development? |  |  |  |  |
| 4.3 Are board members able to clearly evidence the impact of training and development, to the quality of governance in the school? |  |  |  |  |
| 4.4 Is clerking (GB and committee meetings) managed effectively? |  |  |  |  |
| 4.5 Does the board have plans in place to ensure effective succession, including leadership succession for the board? |  |  |  |  |
| 4.6 Has the chair recently accessed training? |  |  |  |  |
| 4.7 Does the board have effective mechanisms in place to hear from and inform pupils, staff, parents and the wider community? |  |  |  |  |
| 4.8 Is the school engaged in cluster working (supporting and drawing support) with other schools and does the board have an understanding of and involvement in these collaborations? |  |  |  |  |
| 4.9 Is the board having a positive impact on outcomes for pupils and are board members able to articulate this? |  |  |  |  |

### **Governing board (GB) health check action plan**

Following completion of the GB Health Check, boards may find it useful to complete the action plan below. It is suggested that, for each core area, actions are created to questions on the GB Health Check document, that are assessed as *Partially* or *Not secure*.

#### **Core area 1 objective: ensuring clarity of vision, ethos and strategic direction**

| **Action** *(link to question numbers assessed as Partially or Not secure on GB Health Check)* | **Success criteria** *(how we will know the action is complete)* | **Governor(s) responsible** | **Expected completion date / RAG** |
| --- | --- | --- | --- |
| ***Examples**** 1. *Set and review the vision following consultation with a range of stakeholders i.e. pupils, parents, staff, wider community, Diocese etc:*
* *consult stakeholders regarding the vision: what makes our school unique; values and ethos; where do we want the school to be in 3-5 years’ time?*
* *develop a working vision, then ask stakeholders*
* *share and celebrate new vision through open events (‘Summer Garden Party’)*
 | * *High levels of engagement from pupils, parents, staff and the community in vision consultation (evidenced through pupil, staff and parent surveys)*
* *Vision encompasses the uniqueness of the school and our values and ethos*
* *All pupils and staff understand and are able to articulate the vision*
 | *PP & BK* | *Final version complete by March.* |
| *4.1 Does the board keep its size and structure under regular review to ensure it supports effective and efficient working:** *does the GB consider alternative leadership/school structures as part of developing/sustaining the future of the school:*
	+ *Executive Headteacher*
	+ *Federation*
	+ *Amalgamation*
	+ *Multi Academy Trust*
 | * *Greater opportunities for pupils*
* *School leadership is secured, succession planning*
* *Development opportunities for staff*
* *Stronger leadership and management*
* *Shared expertise and collaboration*
* *Strengthened governance*
* *Efficiencies leading to cost savings*
 | *FM & JL* | *Review annually* |

#### **Core area 2 objective: holding the headteacher to account for the educational performance of the school and its pupils**

| **Action** *(link to question numbers assessed as Partially or Not secure on GB Health Check)* | **Success criteria** *(how we will know the action is complete)* | **Governor(s) responsible** | **Expected completion date / RAG** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

#### **Core area 3 objective: overseeing the financial performance of the school and making sure its money is well spent**

| **Action** *(link to question numbers assessed as Partially or Not secure on GB Health Check)* | **Success criteria** *(how we will know the action is complete)* | **Governor(s) responsible** | **Expected completion date / RAG** |
| --- | --- | --- | --- |
|  |  |  |  |
|  |  |  |  |

#### **Core area 4: effective governance**

| ***Action*** *(link to question numbers assessed as Partially or Not secure on GB Health Check)* | ***Success criteria*** *(how we will know the action is complete)* | ***Governor(s) responsible*** | ***Expected completion date / RAG*** |
| --- | --- | --- | --- |
| ***Examples****4.5 Is there plans in place to ensure effective succession, including leadership succession for the board?** *Governor induction:*
	+ *induction programme developed: source examples, reach out to GBs in your cluster re their induction practices, consult new board members on what has and would have supported their induction*
	+ *consider exit interviews for board members*
	+ *recruitment: register board vacancies on* [*Governors for Schools*](https://governorsforschools.org.uk/) *etc.*
* *Chair succession planning:*
	+ *GB understands natural succession expectations*
	+ *appointment of two vice chairs*
	+ *support/mentor role is provided to new chair and upcoming chair*
 | * *Governor induction in place:*
	+ *all new board members complete induction*
	+ *new board members understand the purpose of governance and can contribute effectively*
	+ *retention of governors increases*
* *Chair succession planning:*
	+ *governors willing to take on role of chair are prepared*
	+ *no gap in recruiting a chair*
	+ *smoother transition, chair to chair (supports headteacher wellbeing)*
 | *Clerk (governance professional), Chair, Lead board member**Chair* | *Final version complete by September**In place by end of October* |
|  |  |  |  |