

Governor and trustee induction checklist

Use this checklist to keep track of your new governor or trustee induction process and make sure they’re up to speed.

This checklist is for chairs, mentors or whoever is responsible for organising induction. You should identify who is responsible for each task (this could be the chair, mentor, clerk, headteacher or someone different, depending on the task).

Adapt the checklist to suit your context, including deciding what items should happen when.

**Note**: you’ll find some information which is only suitable for academy trustees (in both single academy trusts and multi-academy trusts) or just MAT trustees. This is clearly signposted.

For more information, read our article on [how to induct a new governor effectively](https://schoolgovernors.thekeysupport.com/uid/04296181-afee-4660-9ea9-6363adf0701b/).

|  |
| --- |
| Items the new governor or trustee should receive |
| **Action** | **Who’s responsible for sending?** | **Item sent?** | **Notes** |
| Required paperwork to fill in. This may include:* Governor/trustee declaration form
* DBS/barred list check
* Declaration of interests form
 |  |  |  |
| [Governor and trustee induction pack and school-on-a-page](https://schoolgovernors.thekeysupport.com/uid/9aa342b8-d509-48fb-a0ed-0c6c3c1cf895/)  |  |  |  |
| Terms of reference for the board and for each committee |  |  |  |
| Governor/trustee code of conduct |  |  |  |
| Minutes from the last full board meeting |  |  |  |
| The latest Ofsted report |  |  |  |
| The latest version of [Keeping Children Safe in Education](https://www.gov.uk/government/publications/keeping-children-safe-in-education--2), which the new governor can [mark as read on GovernorHub](https://help.governorhub.com/en/articles/3174445-can-i-record-that-i-ve-read-keeping-children-safe-in-education-kcsie) |  |  |  |
| Access/registration details for [GovernorHub](https://help.governorhub.com/en/articles/586851-how-do-i-set-up-my-governorhub-account) (or other shared area, if applicable) |  |  |  |
| Login details for secure governor email account (if applicable) |  |  |  |
| Information on:* The school/trust website, so the new governor/trustee can read through
* School visits
* Where to access policies
 |  |  |  |
| **For academy trustees only**:* Memorandum
* Articles of association
* Scheme of delegation
* The risk register
 |  |  |  |
| [The Governance Handbook](https://www.gov.uk/government/publications/governance-handbook) from the Department for Education**For academy trustees:** the [Academy Trust Handbook](https://www.gov.uk/guidance/academy-trust-handbook) |  |  |  |

|  |
| --- |
| Meeting the governing board/board of trustees |
| **Action** | **Who’s responsible?** | **Completed?** | **Notes** |
| Assign mentor/buddy |  |  |  |
| Organise a welcome meeting with the chair (or vice-chair, if they’re leading induction)  |  |  |  |
| Organise a welcome meeting with the headteacher/CEO |  |  |  |
| Send details of the first full board meeting so the new governor/trustee can attend |  |  |  |
| Send committee meeting details so the new governor/trustee can observe |  |  |  |

|  |
| --- |
| Training and paperwork |
| **Action** | **Who’s responsible?** | **Completed?** | **Notes** |
| Identify training needs by getting the new governor/trustee to complete a skills audit |  |  |  |
| Send induction training  |  |  | Use GovernorHub’s induction courses for:* [Maintained school governors](https://schoolgovernors.thekeysupport.com/governor-training/induction-maintained-school-governors/)
* [Academy trustees](https://schoolgovernors.thekeysupport.com/governor-training/induction-academy-trustees/)
* [Academy governors on local governing bodies](https://schoolgovernors.thekeysupport.com/governor-training/induction-local-governors-mats/)
 |
| Make sure they complete safeguarding training |  |  | Safeguarding training at induction is a requirement in KCSIE. GovernorHub’s [safeguarding for governance](https://schoolgovernors.thekeysupport.com/governor-training-resource-hub/safeguarding-for-governance/) course allows governors and trustees to fulfil this requirement. |

|  |
| --- |
| Visiting the school |
| **Action** | **Owner** | **Completed?** | **Notes** |
| Organise a school tour **For MAT trustees**: Organise tours for schools across the trust |  |  |  |
| Arrange for them to meet:* Members of staff
* School council

**For MAT trustees**: meet the trust central team |  |  |  |
| (If applicable) Make sure the new governor/trustee brings original versions of documents used for their DBS check when they first come to school |  |  |  |

* Our associate education expert Fred Birkett helped us create this checklist. Fred Birkett is an experienced teacher and education consultant. He’s been a governor for 20 years in primary and secondary schools and a chair of governors for half that time