

Governor and trustee induction

A step-by-step guide for governing boards

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A well-planned induction programme helps new governors and trustees to become familiar with their school or trust and what their role entails.

Responsibility for overseeing induction should be allocated to individual(s) such as the governance professional or a member of the central team in a multi academy trust (MAT).

The most effective induction programmes take into account the knowledge, skills and experience of new board members – this guide provides a starting point to develop a programme that suits your school/trust context and the experience of the new board member.

Step 1. Introductory visit and meeting

Extend an early invitation to visit the school (or schools) as an opportunity to:

- be welcomed by the chair and the headteacher/CEO
- have a guided tour, experience the culture, meet staff and talk to pupils
- complete preliminary tasks such as appointment verification or a photograph for the website

At this point, discuss any support that the new board member may need to participate fully. Be open to talking about individual needs and circumstances such as caring responsibilities, disabilities and religious observances. Make them aware that they can [claim for certain expenses](#).

Step 2. Introduce other contacts

This is likely to include:

- **the governance professional** (clerk to the board), to talk through meeting arrangements, administration matters, such as the [register of interests](#), and access to board papers
- **committee chairs and relevant link governors** to help explain committee responsibilities
- **a mentor** assigned to help guide the new board member in the first few months of their role (an experienced governor or trustee who can help answer questions)

We recommend new **local governors within a MAT** meet with a trustee or member of the trust's central team as an opportunity to learn about the vision and aims of the trust overall.

Step 3. Provide essential information

We encourage governing boards to supply key information to new members in a way that is easy to navigate and refer to in the first few weeks and on an ongoing basis. Most boards provide access to board documents and contextual information via a digital file sharing platform.

The information provided should be tailored to fit the context of the school or trust and the needs of the individual. As a guide, we recommend that it covers the following areas.

Roles, responsibilities and conduct

NGA [model role descriptions](#) can be adapted to help new governors and trustees understand their responsibilities and can also be used to explain the roles of [chair](#) and [governance professional](#).

We recommend that all boards adopt a [code of conduct](#) that sets out the professional standards required. New members should agree to follow the board's code of conduct on being appointed.

The current context and priorities

Information that helps the new board member get to know the school or trust, such as:

- a prospectus or website link to information including mission, vision and values
- the current strategy document (that references the school/trust improvement priorities)
- a high level summary of performance standards/pupil outcomes in the school/trust

How governance works in the school or trust

The following documents and resources will help give new board members a clearer idea:

- a calendar of meetings for the year, including key dates such as strategy days
- details of the governing board's committees and their [terms of reference](#)
- the instrument of government or articles of association and scheme of delegation or delegation planner
- the most recent governing board self-evaluation or facilitated review
- a copy of the funding agreement (in academies)
- signposting DfE governance guides for [maintained schools](#) and [academy trusts](#) as well as the [Academy Trust Handbook](#) (for trustees).

Step 4. Signpost induction training

NGA believes that everyone who is new to school governance should attend an induction training course. This is typically provided by the local authority, the foundation charitable body (associated with the school or trust), the academy trust or a specialist organisation [such as NGA](#). As a minimum, the training must result in a clear understanding of what governance is.

All governors and trustees must also undertake [safeguarding training](#) (that includes online safety). We recommend that this forms part of induction and takes place regularly thereafter.

While new governors and trustees should take responsibility for undertaking induction training, this expectation should be made clear, courses signposted, and take-up monitored. A [skills audit](#) will help to identify and prioritise further areas of development for the new board member.

Step 5. Support prior to the first meeting

Your induction programme should help new board members to make meaningful contributions during meetings as soon as possible. To help them prepare, we advise that you provide:

- an opportunity to observe a meeting before being expected to contribute
- access to meeting papers (and any digital file sharing platforms)
- previous minutes or agendas to get an understanding of the type of topics covered
- examples of [types of questions asked during meetings](#)
- your virtual meeting protocol or [ground rules for virtual meetings](#) (if applicable)

NGA resources for new governors and trustees

- [Knowledge Centre](#) – exclusive online access to practical governance resources
- [Learning Link](#) subscribers can access flexible e-learning on a range of topics
- [NGA networks](#) offer opportunities to share knowledge and experiences
- [Welcome to Governance LIVE training sessions](#)
- [Glossary of governance terms](#) is a useful induction resource

NGA induction guides

We recommend that new governors and trustees receive a copy of [Welcome to Governance](#) or [Welcome to a Multi Academy Trust](#). These essential entry-level guides help those new to governance become effective.

Developing skills and knowledge beyond induction

New volunteers should remain proactive in developing governance skills and knowledge. We recommend prioritising training and support in key areas of responsibility, such as [financial governance](#) or [safeguarding](#), before exploring wider areas.

New board members can find an overview of development opportunities within chapter four of [Welcome to Governance](#) or chapter five of [Welcome to a Multi Academy Trust](#).

Governors and trustees can follow [@NGAMedia](#) to readily access some of the leading authorities and experts in school governance that are active on X (Twitter).