



Learners' Trust **School Champions** **Handbook**

Updated: June 2024

Next review date: June 2025



Contents

Precursor: The core function of a School Champion (p.5)

Section 1: iAbacus – The Local Board is clear on its role and function as set in the School Champions Handbook

- 1.1 Introduction p.5**
- 1.2 Why 'Champions'? p.5**
- 1.3 Moving from Local Authority Governing Body to School Champions p.5**
- 1.4 Key changes to the Scheme of Delegation as Learners' Trust has evolved and grown over time p.6**
- 1.5 General principles of strategic thought and operational understanding within the Learners' Trust aligned to our Mission, Culture and Strategy p.7 (New)**

Section 2a: iAbacus – The Local Board keeps an appropriate size and structure and reviews annually

- 2a.1 Champions Terms of reference p.11**
- 2a.2 Constitution of School Champions Boards p.12 (New)**
- 2a.3 The temporary suspension of the Champions Board p.13 (New)**
- 2a.4 Establishing an Executive Champions Board (ECB) p.15**
- 2a.5 The whole School Champions Board and the use of committees p.17**

Section 2b: iAbacus – The School recruits Local Board members who have the correct profile

- 2b.1 Appointment and election of new School Champion Board members p.18**
- 2b.2 Resignation and removal of School Champion Board members p.19**
- 2b.3 Disqualification of School Champions Board members p.20**

Section 3: iAbacus – The Local Board has access to Trustees in order to support and challenge the work of the Trust

- 3.1 Trustees – questions from the Trust and for the Trust p.23 (New)**
- 3.2 Champions – invites to observe the work of the Trustees p.23 (New)**

Section 4: iAbacus – The Local Board follows the consistent and pre-planned model for meeting cycles and agendas outlined in the Champions Handbook

- 4.1 The School Champions Board meeting structure p.24 (New)**
- 4.2 The Annual General Meeting (AGM) p.26 (New)**

Section 5a: iAbacus – The Local Board uses self-evaluation frameworks to identify the focus for information gathering, challenge and support at future meetings

- 5a.1 Using iAbacus as a framework for structuring discussion p.27 (New)**

Section 5b: iAbacus – The Local Board engages in appropriate training that enables them to perform their roles effectively

- 5b.1 Training and Continuous Professional Development for School Champions p.27**

Section 6a: iAbacus – The Local Board has access to and is familiar with the key requirements of the Academies Handbook

6.1 Cross-references to key Department for Education (DfE) documents p.28

6.2 Conflicts of Interest and adhering to the DfE documents p.28

Section 7a: iAbacus – The Local Board has a professional clerk who has a good understanding of the statutory context in which the school operates

Section 7b: iAbacus – The Clerk produces accurate and timely minutes and has access to procedural advice and support

7.1 Clerking and Minutes p.31 (New)

Section 8: iAbacus - Meetings are effectively chaired by a nominated, non-Trust employed, member of the Local Board

8.1 The Chair of the Champions Board p.32

Section 9a: iAbacus - The Local Board receives a headteacher report that informs their knowledge so that they have a greater overall understanding of the leadership within the school

9a.1 Trust-wide sources of evidence that can be utilised to support Champion's knowledge about leadership p.33 (New)

Section 9b: iAbacus - The Local Board receives a headteacher report that informs their knowledge so that they have a greater overall understanding of the standards within the school

9b.1 Trust-wide sources of evidence that can be utilised to support Champion's knowledge about standards p.33 (New)

Section 9c: iAbacus - The Local Board provides support and challenge in order to gain a greater understanding of the school's leadership/standards provision

9c.1 Following a line of enquiry or interest as a School Champion p.34

9c.2 The role of the Trust Partner in working alongside School Champions p.34

9c.3 The role of the Trust Partner in School Staff and Headteacher Appraisal p.35

Section 10: Those involved with local accountability are confident that the school is tackling weakness at an appropriate pace and providing value for money

10.1 Triangulating information as a Champion p.37 (New)

Appendices

Appendix 1: Model agendas p.38-44

Appendix 2: Key Documents p.45-72

Precursor:



The core function of a
School Champion is to
monitor an aspect of the
school's work to gain a
further understanding of
it, in order to provide a
platform for support and
challenge.

[Section 1: iAbacus – The Local Board is clear on its role and function as set
in the School Champions Handbook](#)



1.1 Introduction

This handbook sets out the advice and support for School Champions within The Learners' Trust. This document aims to enable all Champions to carry out their work effectively, as well as fulfil their roles and responsibilities in line with the Learners' Trust Scheme of Delegation. Where appropriate, specific reference is made to the [Academy Trust Handbook](#).

1.2 Why 'Champions'?

Within the Learners' Trust Local Governing Bodies are referred to as 'School Champions'. Therefore, the meaning and role of 'Local Governing Body', 'Local Board' and 'Local Governance' are all encapsulated within the over-arching term 'School Champions'. The term 'Champions' is apt, as a major function of these locally determined boards within the Learners' Trust is to champion the needs of the children, school, staff and the local community that each individual school setting serves. School Champions also bring vital contextual knowledge to their role which supports them in their strategic function of being a 'critical friend' to the school.

1.3 Moving from Local Authority Governing Body to School Champions

The single biggest difference between a Local Authority Governing Body and the School Champions is that the legal responsibility changes as schools come under a Multi-Academy Trust's Scheme of Delegation. Many of the obligations that previously were the responsibility of the Governing Body within a LA structure ordinarily transfer to the Board of Trustees. A key feature of the revised Scheme of Delegation states that Champions would 'monitor an aspect of the school's work to gain a further understanding of X (for instance, the implementation of a new reading scheme to raise attainment across Key Stage Two)', whereas Trustees would monitor value for money, effectiveness and overall impact of a MAT wide investment, in for instance, a reading scheme. This element of the School Champions' work is fundamental in providing its' members with a platform with which to support and challenge school leaders, as well as representatives from the Trust. The Trust representative would usually be the school's dedicated Trust Partner, however it is important to note that School Champions may also, as required, feedback to members of the Trust's Central team (i.e. Chief Financial Officer, Trust Business Manager, Chief Operations Officer etc.), as well as Trustees who are readily accessible to those that serve as School Champions. Put simply, the support and challenge



School Champions offer is two-fold: to the school, it's staff and Senior Leaders (school level) and, on the other hand, to the Trust its' Central Team and the Board of Trustees (organisational/MAT level).

Additionally, it is important to recognise that School Champions also have a significant moral responsibility. Champions are the independent voices that have access to pertinent information. They form an important layer of local accountability and transparency within the context of the governance structure of Learners' Trust as a whole. Wherever possible they should seek to enable CHOICES (Connected Helpful Organised Informed Candid Effective Simple) when undertaking their role, in line with the Trust's vision statement. Organisationally the CHOICES vision permeates every aspect of the Trust's work and forms a commonality of purpose in both MAT-wide governance and the overall day-to-day functioning of the Trust.

1.4 Key changes to the Scheme of Delegation as Learners' Trust has evolved and grown over time

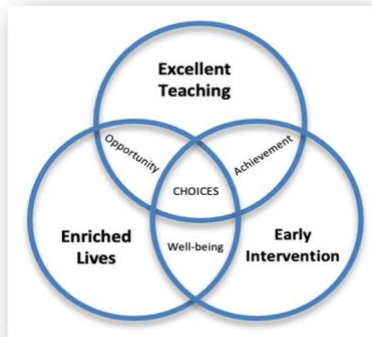
Initially, when the Learners' Trust comprised of only a handful of schools, early iterations of the Scheme of Delegation allowed School Champions to choose their own structure and remit, according to the schools they were supporting. This freedom to choose also had a set of functions which rapidly changed as the Trust grew and developed as a business. For example, the budget recommendation described in the original Scheme of Delegation is now almost defunct as the Trust increasingly centralises budgets and contracts for services. Alongside this, the management and mitigation of risk became more imperative as the Trust grew in size and increasingly the language within the Scheme of Delegation evolved to reflect this. Simple practical and operational changes to the document were also required to bring consistency of approach, without stifling or compromising the individuality and identity of each Champions Board. The latest Scheme of Delegation seeks to define small differences in the roles of Trustees and School Champions so that the membership of both can clearly establish what the purpose of each board is and have a clearer understanding of what their respective roles entail.

1.5 General principles of strategic thought and operational understanding within the Learners' Trust aligned to our Mission, Culture and Strategy

Mission

We will use **collaboration** to:

- **Deliver excellent teaching** through effective professional learning communities;
- **Enrich lives** through inspiring curriculum experiences;
- **Ensure early intervention** through equity for all learners and intervening at the earliest possible opportunity.



General principles that underpin our mission are:

- safeguarding is a vital and integral part of the Trust's everyday work. It is of paramount importance in everything that is done and will remain high-profile at all times;
- all representatives of the Trust will adopt a nuanced and targeted approach to tackling discrimination, inequality and prejudice wherever it occurs in order to form positive, productive and tolerant connections between people and eradicate hate and ignorance;
- every child has the right to the highest quality academic, social, emotional, spiritual and physical education;
- high quality intervention will be provided where appropriate to ensure that the learning, welfare and well-being needs of all pupils are met at the earliest opportunity;
- the Trust will aim to identify and foster the passions that motivates each child. Fundamentally this means working together so that children enjoy learning and want to go to school.

Culture

Through our behaviours we will be:

Connected (developing positive, well maintained and productive relationships)
Helpful (embracing servant leadership and using initiative to solve problems)
Organised (employing efficient strategies and trusting colleagues to deliver)
Informed (sharing information openly, broadly and deliberately)
Candid (disagreeing openly and compassionately)
Effective (retaining only our best elements and seeking continuous improvement)



Simple (avoiding complexity and increasing clarity)



General principles that underpin our culture are:

- the needs of children will be at the heart of every decision taken and the CHOICES culture will permeate all aspects of our work;
- there will be clear structures in place to ensure that the voices of all children, young people and other stakeholders within the Trust are heard and valued.

Strategy

We will:

- **Bring sensible alignment and create capacity** for all schools
- **Seek continuous improvement** through marginal gains
- **Ensure support is bespoke and responsive to need**
- **Employ and invest in purpose driven, passionate educators**

Marginal Gains – The process of continual improvement through constant incremental gains

- School Champions will operate within the framework identified within the School Champions Handbook. Their core function will be to ‘monitor an aspect of the school’s work, in order to gain a further understanding of it, in order to provide a platform for support and challenge’;
- School leaders will have, where possible, delegation of responsibility and decision making for the strategic direction and day-to-day operation of their schools. The Trustees, CEO and Trust Partners reserve the right to intervene if there is appropriate cause for concern in terms of school performance, financial indicators, associated risk or for any other reason that could be perceived by the Trustees, CEO or Trust Partner to reputationally damage either the school, MAT or both;
- the Trustees will take action, including the partial or full withdrawal of responsibilities, if it has evidence to suggest that an individual, group or whole body of School Champions are failing to carry out their duties effectively in relation to the Code of Conduct or the Scheme of Delegation;
- the Trust will endeavour to preserve Local Board’s composition of members of schools judged to be ‘Good’ or better by OfSTED who are joining the Trust, where possible. Exceptions to this include, but aren’t limited to, where alterations are required in order to comply with legal or statutory requirements, or to ensure overall operational effectiveness. Where schools are judged to ‘Require Improvement’ or have been deemed ‘Inadequate’ by OfSTED, the Local



Board arrangements will be considered on a case-by-case basis. The Trust Partner will initially be involved in monitoring this, however, in these circumstances, both the CEO and representatives from the Trustees reserve the right to intervene at Local Board level at any point, for any reason. Where the Secretary of State has put in place an Interim Executive Board (IEB), the Trust will request some type of formal representation on the IEB prior to conversion (one or more of Trust Partner, CFO, CEO, or Trustee member/s). This will be negotiated in partnership with the DfE;

- the Trustees will only consult School Champions in highly exceptional circumstances before putting in place any arrangements which directly affect individual schools. Trustees will make decisions on policy or procedural matters. Trustees have no *requirement* to consult and, where this is entered into, it will be done at their discretion.
- School Champions and leaders of individual schools in the Trust have autonomy, responsibility and accountability as defined within the Learners' Trust Scheme of Delegation. The Trustees have a significant role in both the mitigation and management of risk and therefore reserve the right to intervene at a local level without prior notice or warning, on a case-by-case basis and wherever they believe it to be necessary. Examples of this include, but aren't limited to: cause for concern in terms of school performance, financial indicators, associated risk or for any other reason that could be perceived by the Trustees or CEO to reputationally damage either the school, MAT or both;
- the Trustees will take action, including the partial or full withdrawal of delegated authorities, if it has evidence to suggest that an individual, group or whole body of School Champions are failing to carry out their duties and responsibilities effectively;
- the Trust will endeavour to preserve the membership of existing Local Boards upon conversion and as they transition to become Champions Boards. Exceptions to this include, but aren't limited to, where alterations are required in order to comply with legal or statutory requirements, or to ensure overall operational effectiveness. Where schools are judged to 'Require Improvement' or have been deemed 'Inadequate' by OfSTED, the Champions Board arrangements will be considered on a case-by-case basis. The Trust Partner will initially be involved in monitoring this, however, in these circumstances, both the CEO and representatives from the Trustees reserve the right to intervene at Champions Board level at any point, for any reason. Where the Secretary of State has put in place an Interim Executive Board (IEB), the Trust will request some type of formal representation on the IEB prior to conversion (one or more of Trust Partner, CFO, CEO, or Trustee member/s). This will be



negotiated in partnership with the DfE.

General principles that underpin our strategy are:

- all Trustees, School Champions members and professionals working for the Trust will accept and embrace their professional responsibility to care for every child and young person within the Trust and locality. They will be open to change, treating all within the wider community with dignity and respect at all times;
- the Trust will operate an 'audit culture' that monitors the key aspects of school performance through the function of the Central Team, most notably in an educational sense via the Trust Partners, who will strive to identify strengths and areas for development and improvement in each school setting;
- Learners' Trust will continually strive to be an employer of choice and value the contribution, welfare and well-being of its workforce;
- the partnership between the Trust and schools will cherish and seek to protect each school's distinctive ethos and identity, whilst at the same time recognising the power of working collaboratively within aligned systems and structures that a connected family of MAT schools can offer;
- where alignment and centralisation occur within the Learners' Trust, it will exist for purposes of risk mitigation, efficiency and in the interests of the wider organisation as a whole;
- Learners' Trust will unashamedly champion equity for all schools. Fundamental to this is an understanding that the schools are the Trust and the Trust is the schools. Why we do things, what we do and how we do it affects and impacts upon others, both within and outside of the organisation;
- the Trust is the statutory body for all the schools within the Trust;
- the Secretary of State for Education has entered into an agreement with the Trust to run the schools in the MAT. The Trustees therefore act as the ultimate responsible body for the standards and operation of all schools across the Trust;
- the Members, Trustees and School Champions will work collaboratively, within a climate of healthy professional support, challenge and 'critical friendship';
- the Trustees will make decisions on matters which affect all academies in the Trust;
- School Champions will operate within the framework identified within the School Champions Handbook. Their core function will be to 'monitor an aspect of the school's work, in order to gain a further understanding of it, in order to provide a platform for support and challenge';

- 
- School leaders will have, where possible, delegation of responsibility and decision making for the strategic direction and day-to-day operation of their schools. The Trustees, CEO and Trust Partners reserve the right to intervene if there is appropriate cause for concern in terms of school performance, financial indicators, associated risk or for any other reason that could be perceived by the Trustees, CEO or Trust Partner to reputationally damage either the school, MAT or both;
 - the Trustees will take action, including the partial or full withdrawal of responsibilities, if it has evidence to suggest that an individual, group or whole body of School Champions are failing to carry out their duties effectively in relation to the Code of Conduct or the Scheme of Delegation;
 - the Trust will endeavour to preserve Local Board's composition of members of schools judged to be 'Good' or better by OfSTED who are joining the Trust, where possible. Exceptions to this include, but aren't limited to, where alterations are required in order to comply with legal or statutory requirements, or to ensure overall operational effectiveness. Where schools are judged to 'Require Improvement' or have been deemed 'Inadequate' by OfSTED, the Local Board arrangements will be considered on a case-by-case basis. The Trust Partner will initially be involved in monitoring this, however, in these circumstances, both the CEO and representatives from the Trustees reserve the right to intervene at Local Board level at any point, for any reason. Where the Secretary of State has put in place an Interim Executive Board (IEB), the Trust will request some type of formal representation on the IEB prior to conversion (one or more of Trust Partner, CFO, CEO, or Trustee member/s). This will be negotiated in partnership with the DfE;
 - the Trustees will only consult School Champions in highly exceptional circumstances before putting in place any arrangements which directly affect either individual or all schools. Trustees will make decisions on policy or procedural matters. Trustees have no *requirement* to consult and, where this is entered into, it will be done at their discretion.



Section 2a: iAbacus – The Local Board keeps an appropriate size and structure and reviews annually

2a.1 School Champions – Terms of Reference

School Champions provide an independent, local and contextualised voice to the Trust on the operation and performance of the academy. School Champions are partners, as well as ‘critical friends’ to both the school and its’ Leadership Team and the Trust, its’ Trustees and Central Team.

Within the current Scheme of Delegation, the headteacher, in conjunction with the Trust Partner, has delegated responsibility for the strategic direction and day-to-day leadership and management of the individual school. School Champions are informed about the work of the school through the meetings they have. In these meetings they focus on either the ‘top half’ of iAbacus (Leadership and Management) or the ‘bottom half’ of iAbacus (Standards). They are able to contribute by: seeking supplementary information to gain a greater understanding of what is being presented to them and to provide a platform for professional challenge; gathering first-hand evidence (where appropriate and in conjunction with school leaders) to triangulate findings and generate discussion; providing an independent view of the school’s work, thus creating transparency in the process; Championing the needs of the locality – it’s community, the staff and most importantly, the children.

Each School Champion has a key role to play in the overall development and success of the school and the Trust as a whole. Exceptional School Champions and Champions Boards not only recognise the needs within their individual school setting, but find innovative and effective methods of joint working with others. They go beyond the immediate and continually seek to be ‘outward facing’. Examples of this include, but aren’t limited to:

- shared learning walks between feeder Infant and Junior settings so that there is ‘challenge’ to school leaders, not only within the individual Champions Board, but also across Champions Boards;
- committing to shared training events or CPD sessions so that Champions Boards can learn from one another;
- where School Champion numbers are low and recruitment is difficult, Champions Boards have formulated innovative methods to combine meetings, sharing human resources across



Champions Boards so that each individual setting can benefit from the critical friendship that this type of governance brings.

It is vital to understand that the majority of challenge and support is undertaken on behalf of the School Champions Board. The Trust Partner is tasked to provide specialist advice, expertise and challenge on an ongoing basis to school leaders. The Trust Partner is a co-opted member of the School Champions and visits schools on a weekly basis to enact this role. It is not unusual for individual Champions to be invited by the headteacher, Trust Partner or other Senior member of school staff to join in with the weekly audits to gain a greater understanding of the process. This is welcomed within Learners' Trust as a whole and actively encouraged where relevant and appropriate.

2a.2 Constitution of School Champions Boards

It is recommended that the number of members who shall sit on the School Champions Board shall be not less than five and not more than nine.

Within the Learners' Trust, School Champions Boards shall usually consist of a **minimum** of;

- one Head Teacher/ Head of School;
- one staff member (either teaching or support staff, no distinction is made in this context);
- one parent member;
- one Trust Partner;
- one other co-opted (who could also be a parent if necessary).

Additionally, School Champions can appoint supplementary co-opted members as needed. Co-opted members have the same voting rights as other members.

Current membership of the School Champions should be updated annually in the Annual General Meeting and sent to IT@learnerstrust.org for publication on the school's website. The Chair of the Champions Board is elected annually.

The following general information, which relates to the constitution of the School Champions Board, could be useful as a quick-check reference point:

- the term of office for each appointment on the Champions Board is four years;

- the Quorum for School Champions Boards is 50% or more of the current membership (where the majority of those present/intending to be present are not paid employees of the Learners' Trust).

Committees with Champions Boards are strongly discouraged as it has significant potential to create duplication of work and blur lines of responsibility across what is almost certainly a relatively small group of people.

2a.3 The temporary suspension of the Champions Board

In order to temporarily suspend the Champions Board, the Trust Partner will need to demonstrate that the following conditions have been met and all stages of this process have been followed sequentially. Within each heading, the **bold** text indicates where the major responsibility for taking action at that various stage lies:

Stage 1 – Establishing the context (**The Champions Board**)

- there is no Chair of Champions currently and there's no imminent prospect of appointing one; and/or
- the Trust Partner has acted in as Chair of Champions for more than two meetings and there are no local options being presented to lead the Champions Board (i.e. there is an over-reliance on the Trust Partner to sustain and/or lead the Champions Board) and/or
- the Champions Board itself have not met quorum for either:
 - three successive meetings;
 - or for a period of six months.

Stage 2 – Reasonable steps to help remedy the situation (**The Headteacher**)

- an attempt has been made to recruit Champions Board members and has been unsuccessful, either in terms of number of candidates coming forward, or that the candidates coming forward are unsuitable for election (e.g. in terms of their skill set, motivation for wanting to become a Champion etc.);
- a thorough and concerted attempt (at least three times within the past six months) has been made by those within the school (most notably the headteacher) to offer expressions of interest to all members **within the school community** (teachers, support staff, parents, carers, regular visitors to school, figureheads within the community such as vicars etc.). This could include pupil letter writing to local businesses, headteacher phone calls to prospective candidates etc. Because of their deep understanding of local context, the onus at this stage is very much on Senior Leaders and those within the school to demonstrate that they've 'gone the extra mile' to remedy the lack of members on the Champions Board.

Stage 3 – The consideration of all possibilities (**The Trust Partner**)

- the matter is raised with the Central Education Team (Trust Partners and the Chief Executive Officer) formally as part of the scheduled fortnightly meetings. The possibility of Executive governance structures, temporary arrangements (such as the involvement of Trustees) and all

- 
- other contextual possibilities are robustly discussed. Challenge and support is offered to the Trust Partner of the school to check that all possibilities have been explored and considered;
- at least one supplementary attempt has been made to recruit ***outside the community that the school serves*** (for instance approaches to organisations such as Learners' First, volunteer agencies etc.).

Stage 4i) – The temporary suspension of the Champions Board (The Board of Trustees)

- subject to all stages 1-3 being followed, and no resolution being found, the Trust Partner should write to the Chair of Trustees, copying in the CEO to notify them of the temporary suspension of the Champions Board.

Stage 4ii) – Monitoring and review on behalf of the suspended Champions Board (The Trust Partner and Headteachers)

- as part of their risk management and risk mitigation duties, the Trustees may request sight of the standardised Champions slideshow presentations from the headteacher about the school and its activities at either full board or committee meetings;
- in the event of the suspension of the School Champions Board, the headteacher will continue to produce the same number of headteacher reports as before and present them to the Trust Partner. These will then be taken forward and critiqued by their group of 'partner Headteachers' from within the hub region via email;
- the expectation of the partner Headteachers is to offer challenge either in-person or over email. The relevant Trust Partner will quality assure this dialogue;
- By exception these reports may also be considered within the relevant fortnightly Mini-headteacher's group as an agenda item and/or at Executive Team meetings on Monday afternoons, or in 1-to-1 meetings between the Trust Partner and CEO.

Stage 5 – 'Keeping the door open' and having a time-limited, reviewable exit strategy (The Trust Partner)

- within the first working month of suspending the Champions Board, the headteacher will revisit Stage 3 and attempt to re-start the Champions Board. The Trust Partner will oversee that this takes place and judge whether a concerted attempt has been made to re-start and re-recruit to the Champions Board.

Stage 6 – Working more closely with the Executive Team and ***those that are responsible for governance*** (The Executive Team for School Improvement)

On an annual basis, following suspension:

- Trustees, acting in their role as those responsible for governance across the Trust, will offer challenge and support to the Executive Team in relation to the stated school as part of their calendared meetings as they see fit;
- re-consideration of any of the above relevant stages is prioritised by those who have contact at a local level (Trust Partner, Headteacher etc.) to seek any possible way forward to re-start the Champions Board at either a stand-alone or Executive (in conjunction with another local Trust school) basis.



2a.4 Establishing an Executive Champions Board (ECB)

In this agreement the two most critical factors to the future success of an ECB are local contextual circumstance and the construction of a clear, measured and informative communication strategy with stakeholders to establish 'buy in'. Ideally an ECB would usually consist of two participating schools. However, context is a significant factor and there are no reasons why (if considered and implemented in a thoughtful and innovative way), this arrangement couldn't extend to three or more schools working in partnership at Champions Board level. Nevertheless, three or more schools would require quite extreme and exceptional local circumstances, as well as significant thought as to how the ECB would operate, to even be considered as a proposed model for local governance.

An illustrative, but non-exhaustive list of contextual circumstance which may lead to the formation of an Executive Board may include:

- if it is in the interests of the wider community that the school serves to form an ECB (i.e. a feeder Infant, combining with the associated Junior School);
- if geographically it makes sense (i.e. two small schools in neighbouring village communities);
- where skills shortages exist, the ECB would allow schools to combine talent and skills at a local level (i.e. a Safeguarding specialist Champion within an Infant School, could offer the Junior similar challenge and support);
- where one school requires the support of another in relation to Champions and local governance in general. Conversely it could be just as successfully implemented as an equal partnership between two schools with functioning, effective Champions Boards;
- if recruitment and retention of Champions is problematic in a community, the ECB may be a more attractive proposition for a prospective candidate if they feel their time investment is going to have wider impact, across the lives and futures of more young people.

Implementing, structuring/re-structuring and sustaining an effective ECB

Wherever possible the proposal of an ECB should've been discussed and agreed upon at a formal meeting of both Champions Boards in advance of any change. The Trust Partner/s and relevant headteachers are vital communicators in forming the new board and should act within the culture of the Learners' Trust in agreeing the re-formed structure.

Context permitting, the ECB should aim to:

- have two separate Chair people representing each school. This is important in terms of the retention of the separate school's identity, but is also useful for promoting challenge as each Chair can act as Vice-Chair for the other school;
- retain as much existing talent within the two existing Champions Boards. An ECB is not a formally recognised mechanism to remove Champions. HR processes that align with the culture of the Trust will need to be followed and consulted closely if there is a risk that existing Champions may not retain their place on the revised ECB;
- have a meeting structure which allows each school to separately present (and therefore clerk separately) in focussed and non-duplicative way. This allows the headteacher of the school who isn't presenting to become a co-opted member of the other school's board, providing support and challenge to their partner head;
- not be dominated by Senior staff from within either school (i.e. more than 50% of the total attendees). Where possible, the head, preferably a member of teaching staff (not SLT) or



support staff and then members from *within* (parent, voluntary helper etc.) or *outside* (local business person, member of university staff etc.) *of the school community* should form the core of the ECB. For instance, this example shows how the ECB could be structured to incorporate the views of wider stakeholders and provide adequate degrees of separation, in terms of challenge and support, to Senior Staff within the school:

From School A – headteacher; SENDCo; two parents and a local small business owner (Chair of Champions)

From School B – headteacher, teaching assistant; one parent (Chair of Champions) and a local charity worker.

From the Trust – Trust Partner and Clerk to Champions

- take around 1 to 1½ hours in total (circa 45 minutes each), with two clear parts (one for School A and the other for School B). It is the responsibility of the two headteachers to have met and planned beforehand (even if this is virtually via Teams or over the telephone) so that duplication is minimised;
- aim to work from a common set of agenda items, with contextual differences being demonstrated through the presentation and questioning that occurs against each separate item, in each half of the meeting;
- make use of technology where appropriate and utilise the ‘lessons learned’ around communication from the Covid pandemic (e.g. whilst it would be unreasonable to suggest that every meeting be done ‘virtually’ over Teams, it is entirely sensible and practical to calendar in a mixture of face-to-face, virtual, within school and after school meetings across the year to best meet the emerging demands of personal, work and family life going forward);
- seek to create workload efficiencies, sharper challenge and wider support at every level (for instance, utilising the skills of one particular Champion to report on their learning walk of mathematics across both schools).

Once established, the ECB should consider factors such as succession and sustainability as part of their ongoing schedule of activity. For instance, at a local-level, discussions might consider:

- what induction, training, support and CPD can we offer Champions within school, across the MAT, from our strategic partners (e.g. Learners’ First) and from further afield (National Governance Association)?
- how do we ‘future proof’ the ECB? When and how will we undertake the next round of recruitment? What skills does the ECB require to complement its current talent pool?
- where is the next Chair/Vice Chair of Champions coming from? Can we mentor and coach existing members of the ECB to take up these Champions leadership positions in the medium to long term?
- how can ensure that the ECB doesn’t become too inward looking and over-reliant on the challenge and support Senior Learners’ Trust staff offer to one another? How representative is the ECB of:
 - Learners’ Trust staff at *all* levels;
as well as,
 - those from *within* and *outside of the school community*?



2a.5 The whole School Champions Board and the use of Committees

Early versions of this handbook referred to committees within the School Champions Board. This structure has evolved over time and, for the most part, the use of sub-committees at local level is very strongly discouraged. Where School Champions Boards lack representation or find it hard to recruit new Champions, keeping the School Champions Board together as a whole has proved to be a useful strategy for retention. Removing duplication of work and mitigating against the blurring of lines of responsibility within School Champions Board are further reasons why committees should not ordinarily be used.

Section 2b: iAbacus – The School recruits Local Board members who have the correct profile

2b.1 Appointment and election of new School Champion Board members

School Champions are strongly recommended to approve up to nine people to be active members of the School Champions Board at any given time. Wherever possible, the School Champions Board should ensure that there's an appropriate range of skills, expertise and experience across the membership as a whole. This is useful for both the effective operational functioning of the School Champions Board, as well as assisting with future-proofing and succession planning in relation to the appointment of prospective new members.

School Champions may appoint one person, in addition to the Headteacher, who is employed at the school to serve on the School Champions Board as a staff representative. The Trust Partner has the delegated power to temporarily suspend any decision made at Champions Board level where the outcome may be deemed to pose a risk to either the school or the Trust, before referring it on to the Board of Trustees for their consideration and final decision. As outlined in the Scheme of Delegation, there are virtually no circumstances where decisions would be made at School Champions level as it simply isn't part of their remit.

The parent representative/s of the School Champions Board should usually be a parent of a pupil at the school at the time when he or she is elected. Other circumstances, such as the continued membership of a parent whose child recently attended the school, may be considered by the School Champions Board as a whole on a case-by-case basis. The Learners' Trust and the schools within it believe strongly that parental representation on School Champions Boards is key and it is actively encouraged at all



times.

The School Champions Board may appoint persons (other than parents) to be ‘co-opted’ to the School Champions. Any co-opted members of the School Champions Board shall have the same rights as others and therefore be entitled to receive notice of and attend any meeting of the School Champions.

There are two main channels for recruitment to Champions Boards, namely:

Appointment to the Champions Board

This process would ordinarily be used where one or more of the following apply:

- several key skills are missing from the Champions Board;
- numbers of Champions are low (less than nine);
- recruitment and/or retention of Champions is difficult for whatever reason;
- the number of suitable candidates wishing to be appointed to the Champions Board doesn’t exceed the number of vacancies available.

The skills matrix (see Appendix 2) is useful in profiling the current skills and expertise within the Champions Board, but also in identifying gaps (and providing evidence with which to determine ‘suitability’ as outlined above) and priorities for the recruitment of new Champions. Appointments will be recommended by the headteacher and approved by the Trust Partner.

Election to the Champions Board

This process would ordinarily be used where one or more of the following apply:

- the number of suitable candidates wishing to be appointed to the Champions Board exceeds the number of vacancies;
- a competitive, voting system is required to challenge community perceptions around matters such as transparency (where for instance, community confidence in the school is low).

The election forms and model letters for Champions (see Appendix 2) should be used in the case of election.

2b.2 Resignation and removal of School Champion Board members

The following applies to both resignation and removal of individual School Champions from their respective School Champions Board:

- a person serving on the School Champions shall cease to hold office if they resign their office by written notice to the School Champions in advance of the next meeting, or, if they resign their office in person as part of an agenda item whilst attending a School Champions meeting (the definition of



'in person' includes all 'virtual' forums, including meetings conducted through Teams). This resignation should be formally noted by the Clerk as part of the meeting;

- a person serving on the School Champions shall cease to hold office if they are removed because of any failure to uphold the values of the Learners' Trust or to act in a way which is inappropriate in relation to the suite of policies that support governance across the Trust. In the vast majority of cases the removal of a School Champion would involve decisions taken by one or more of the following, ordinarily in consultation with the Trust HR services and the Chair of Trustees (or in their absence, the Vice Chair): the Trust Partner, the Headteacher, the Chair (or Vice Chair, in the case of the Chair), a Trustee or the Trust Chief Executive Officer. The Trustees reserve the right to remove a member of School Champions Board at any given time if they have evidence or reason to believe that they are not adhering to one or more aspects of Trust policy, pose a reputational or financial risk to the Trust or are compromising the safety, welfare, well-being or safeguarding of children or staff, or for any other reason that Trustees may deem harmful to Learners' Trust as an organisation;
- the Trust HR or Chair of Trustees would, where possible, communicate the decision to remove a School Champion directly to them in writing. As part of that correspondence, they may choose to outline their overarching reasons for removal. Written representations may be made to the Board of Trustees as a whole within ten working days of receiving the decision to remove. If written representations aren't forthcoming or fall outside of this timescale, the decision to remove will be final. Where written representations are made, they will be heard as part of the agenda at the next Full Board of Trustees meeting. Ordinarily this would be done in the absence of the School Champion who is appealing and only in highly exceptional circumstances would it be appropriate for them to attend the relevant Board of Trustees meeting. The Chair of Trustees will determine the appropriateness of their attendance in consultation with the Trustees and the Chair will have the final say on the matter. Following the meeting, the decision to remove the School Champion will then either be upheld, in which case the decision to uphold will again be communicated in writing, or in the case of the decision being overturned, the Champion may return to their duties on the School Champions Board.



2b.3 Disqualification of School Champion Board members

The following applies to the disqualification of individual School Champions from their respective School Champions Board:

A School Champion must be aged 18 or over at the time of his/her election or appointment and cannot hold more than one governance role at the same school.

A person is disqualified from election or appointment as a parent Champion if s/he:

- is employed at the school for more than 500 hours in any 12 consecutive months;
- is in breach of the School Champions Code of Conduct and/or in the view of Trustees is unfit to govern as a School Champion due to their conduct, behaviour or any other potentially reputationally damaging activity that they have engaged in.

A person is disqualified from holding or continuing to hold office as a School Champion if s/he:

- has failed to attend School Champion meetings at the school without the consent of the Champions Board, for a continuous period of six months;
- has been disqualified for failing to attend School Champion meetings at the school without the consent of the School Champions Board, for a continuous period of six months whilst serving as a co-opted School Champion at the school in the last 12 months;
- has had his/her estate sequestered and the sequestration has not been discharged, annulled or reduced;
- is subject to a bankruptcy restriction order, an interim bankruptcy restrictions order, a debt relief restrictions order or an interim debt relief restrictions order;
- is subject to:
- a disqualification order or disqualification undertaking under the Company Directors Disqualification Act 1986
- a disqualification order under the Companies Directors Disqualification (Northern Ireland) Order 2002
- a disqualification undertaking accepted under the Company Directors Disqualification (Northern Ireland) Order 2002
- an order made under section 429(2)(b) of the Insolvency Act 1986 (failure to pay under a county court administration order);
- has been removed from the office of charity trustee or trustee for a charity by an order made by the Charity Commission or Commissioners or High Court on the grounds of any misconduct or mismanagement in the administration of the charity for which s/he was responsible; or to which s/he was privy; or to which he contributed, or he facilitated by his conduct; or

- 
- has been removed, under section 34 of the Charities and Trustee Investment (Scotland) Act 2005, from being concerned in the management or control of any body;
 - is included in the list of people considered by the Secretary of State as unsuitable to work with children (under section 1 of the Protection of Children Act 1999);
 - is subject to a direction of the Secretary of State under section 142 of the Education Act 2002 (or any other disqualification, prohibition or restriction which takes effect as if contained in such a direction);
 - is subject to a direction of the Secretary of State under section 128 of the Education and Skills Act 2008;
 - is barred from regulated activity relating to children in accordance with section 3(2) of the Safeguarding Vulnerable Groups Act 2006;
 - is disqualified from working with children under sections 28, 29, or 29A of the Criminal Justice and Court Services Act 2000;
 - is disqualified from registration under Part 2 of the Children and Families (Wales) Measure 2010 for child minding or providing day care;
 - is disqualified from registration under Part 3 of the Childcare Act 2006;
 - has been convicted of any offence and received a sentence of imprisonment (whether suspended or not) for a period of not less than 3 months (without the option of a fine) in the 5 years before or since becoming a School Champion;
 - has been convicted of any offence and received a prison sentence of two and a half years or more in the 20 years before becoming a School Champion;
 - has been convicted of any offence at any time and received a prison sentence of 5 years or more;
 - has been convicted of an offence and sentenced to a fine under section 547 of EA 1996 (nuisance or disturbance on school premises) or under section 85A of the Further and Higher Education Act 1992 (nuisance or disturbance on educational premise) during the 5 years prior to or since appointment or election as a School Champion;
 - has refused a request by the clerk to the School Champions to make an application under section 113B of the Police Act 1997 for a criminal records certificate.



Section 3: iAbacus – The Local Board has access to Trustees in order to support and challenge the work of the Trust

3.1 Trustees - questions from the Trust and for the Trust

In order to create clear and open channels of communication between Champions Board and those that are ultimately responsible for governance (i.e. the Board of Trustees) there is a standard item on the School Champions meeting agenda entitled, 'Questions from the Trust and for the Trust'. This helps:

- Trustees to further understand local context and triangulate information they are being presented with by members of the Executive Team at Trustee meetings;
- Trustees to 'shadow' the work of Trust Partners at mutually agreed points of time (for instance, through Mini HT meetings);
- on an annual basis (and in-line with the risk register the Trust holds around OfSTED gradings and timing for inspection), individual Trustees will shadow/link with schools as they begin to enter the 'window' for inspection;
- reassurance, transparency and reputational strength throughout all levels of governance within the Trust. Appropriate separation between levels of governance are maintained, however carefully and precisely defined channels of communication are in place throughout the year for whenever people feel it necessary to utilise them.

3.2 Champions – invites to observe the work of Trustees

On a rotational basis Chairs of School Champions will be invited (as an observer) to attend one or more of: a Full Board meeting, Leadership and/or Standards Committee. The detail and rationale behind this arrangement can be found on p.70/71 in the invite letter.



Section 4: iAbacus – The Local Board follows the consistent and pre-planned model for meeting cycles and agendas as outlined in the Champions Handbook

4.1 The School Champions Board meeting structure

The strong recommendation of Learners' Trust is that there are four meetings of the full School Champions Board per year. School Champions/Headteachers shouldn't organise additional meetings (either clerked or not) alongside this, for any other purpose or reason. Of the four meetings, two will have a 'Standards' focus (refer to Appendix 1) and two will have a 'Leadership' focus (refer to Appendix 1). Taking each school year as a six-term calendar, Standards would be reviewed in Term 1 and Term 4; Leadership in Term 2 and Term 6. Terms 3 and 5 are left open for training updates and opportunities to visit the school to gain first-hand evidence, as they are relatively short terms and the time-gap between Champions meetings isn't unreasonable (see Appendix 2). There is an additional AGM/Business Meeting (refer to Appendix 1) at the beginning of each academic year, but this can readily be merged with the first meeting of the year if required. Put simply, the structure of meetings alternates between the 'bottom half' and 'top half' of the iAbacus. School Champions Boards have the discretionary power to nominate a further two iAbacus beads for ongoing reporting. Therefore, the scheduled meeting could be focussed on Standards. However, the School Champions may require updates around Finance and Safeguarding (traditionally Leadership beads). This option has been introduced in order to be responsive in relation to emerging matters at the school, but also to be flexible in terms of offering greater platforms for accountability at a local level.

Agendas and accompanying papers, including headteacher reports, are published with at least one week's notice and will follow the Trust's standard agendas.

Headteacher reports follow a standardised [Powerpoint format](#). With our CHOICES culture in mind, this change was brought in against the backdrop of the following considerations:

Connected – the consistent, universally adopted format enables accessibility of key information for all Champions. Where Champions Boards are non-functioning, the headteacher will be asked to send out the slides to their Cluster headteacher group (at the same time that meetings would ordinarily take place, totalling four times a year) and pick up on any challenge questions or critical friendship that arises as a result. With or without Champions, the Trust community will remain closely connected to the work of the school.



Helpful – concluding slides scaffold challenge and support, encourage ‘critical friendship’ and enable Champions to focus on the impact of their work.

Organised – information is prioritised and structured so that school leaders can clearly articulate where a school is, what it needs to do next and why it needs to do it.

Informed – throughout the academic year School Champions will receive standardised reports on all beads within iAbacus at least twice. Time is set aside for them to undertake training, as well as make visits to school to collect first-hand information.

Candid – the key iAbacus elements that are discussed between the Trust Partner and Senior Leaders from the school are shared, un-edited and in their entirety with School Champions. There is no dilution of message or creation of doubt: the key bead priority is given, along with the accompanying Basecamp action/s.

Effective – signposts are given to relevant places (such as key policy documents on the school website) through defined hyperlinks within the presentation so that effective sources of wider information are offered, alongside the key messages that are shared by school leaders.

Simple – our School Leaders work hard and our School Champions are volunteers. Simplifying the presentational format places fewer demands on their time and lightens their workload, whilst creating clarity for all parties in the process. The Board of Trustees and Learners’ Trust Executive Team members value their significant contribution to the work of our schools and are committed to demonstrating that in the ‘why, how and what?’ of everything we do.

In schools where Champions Boards are not fully functioning, the expectation is that the headteacher will still populate the report at the same regular intervals (Terms One, Two, Four and Six). This will then go to the headteachers in their region for challenge and responses. By exception it can then go to the Central Education Team and/or Full Board. For any reason and at any point, the Chair or Vice-Chair of the Board of Trustees may also request that these reports be sent for inspection to the full Board should they so wish.



4.2 The Annual General Meeting (AGM)

At the start of each new academic year School Champions should hold an AGM. This meeting can be linked to the first full Champions meeting around Standards, where appropriate. The purpose of the AGM is to clarify issues relating to membership, ways of working and responsibilities for the year.

At this meeting;

- the School Champions should revisit membership and make plans to appoint where necessary;
- a Chair of School Champions should be elected. The name and contact details should be shared with the Clerk. This will then be sent for approval and ratification by the Board of Trustees;
- a copy of the most recent School Champions Handbook, alongside the Scheme of Delegation, should be available for reference, but not necessarily circulated to all members of the School Champions Board;
- the Code of Conduct should be checked, understood and adopted;
- the four meeting dates for the forthcoming academic year should be considered and, where appropriate, determined;
- the Register of Business interests should be completed in full by each School Champions member;
- any training requirements should be highlighted to the headteacher and/or Trust Partner in order for them to facilitate action on these.



Section 5a: iAbacus – The Local Board uses self-evaluation frameworks to identify the focus for information gathering, challenge and support at future meetings

5a.1 Using iAbacus as a framework for structuring discussion

School Champions would be expected to professionally challenge, support, ask questions and potentially seek further information around each bead. The headteacher may well find it useful to have the 'live' iAbacus sitting beneath (in a minimised tab for instance) the standardised slideshow presentation for reference purposes. It is entirely reasonable to expect that some beads will not have detailed accompanying reports and will be reported upon 'by exception'. For instance, 'Premises' could feasibly be moved through quite quickly if there are no outstanding items or changes since the last report. Similarly, it will be useful to explore other beads in more detail as the need arises. School Champions can expect to have in-meeting access to the statements that sit behind the overarching individual themes and offer 'critical friendship' in relation to specific elements contained within beads.

Section 5b: iAbacus – The Local Board engages in appropriate training that enables them to perform their roles effectively

5b.1 Training and Continuous Professional Development for School Champions

School Champion's core training is delivered through Flick Learning <https://www.flicklearning.com>. The Trust provides a range of wider CPD opportunities in addition to this. Through Trust membership, School Champions have access to free training through Learners First Schools Partnership (<https://www.learnersfirst.net/governance-development/>). As part of this offer Learners First have collaborated with The National Governance Association to produce a series of over sixty-five online, 'on-demand' training modules, which again can be accessed free through the subscription that Learners' Trust has with Learners First (<https://www.learnersfirst.net/wp-content/uploads/2021/12/NGA-Learning-Link-module-list-SEPT-2021.pdf>). Registration is free and can be completed by:

- visiting <https://www.nga.org.uk/Home.aspx> ;
- selecting 'Training and Development', then 'Learning Link - E-learning';
- clicking the 'Learning Link – self-registration' option;



- Inputting your details and selecting your school (via the post code search) from the list.



Section 6a: iAbacus – The Local Board has access to and is familiar with the key requirements of the Academies Handbook

6.1 Cross-references to key Department for Education (DfE) documents

‘The Academies Financial Handbook’ has been renamed ‘The Academy Trust Handbook’. The document has a strong financial focus and outlines the steps multi-academy trusts need to take so that they adhere to their funding agreement, including the appropriate financial controls and management processes that need to be in place. It can be referenced here:

<https://www.gov.uk/guidance/academy-trust-handbook>

6.2 Conflicts of Interest and adhering to the DfE documents

Any member of the School Champions who has, or has knowledge that they may about to have, any direct or indirect duty or personal interest (including, but not limited to any personal financial interest) which conflicts or may conflict with their duties as a member of the School Champions Board should disclose it to the School Champions Board as soon as they become aware of it. The School Champions Board, Trustees and Central Team (including the Trust Partner and Chief Executive Officer) reserve the right to seek further information about the nature of the conflict of interest until the point at which they are satisfied the individual concerned is fit and proper to assume the role of a School Champion. If insufficient information is forthcoming, the Board of Champions and Trustees reserve the right to not accept the nomination for School Champions membership. In the case of a serving member of the School Champions Board, this may include the termination of office and immediate removal from the School Champions. Similarly, failure to disclose a conflict of interest which is subsequently discovered may result in immediate removal from the School Champions Board. Additionally, if the information given to the School Champions Board indicates that the individual may be compromised in terms of their impartiality, objectivity or capability in undertaking the role, this may lead to any of the steps outlined above being implemented.

Where someone has a conflict of interest that is both declared and not considered a significant impairment to their role, it may be necessary for that individual to absent themselves from any specific discussions of the School Champions Board in which it is possible that a conflict will arise between their duty to act solely in the interests of school, the staff and most importantly, the children.



Ordinarily, but not exclusively, a person is deemed to have a personal financial interest if they are in the employment of a given company, and/or is in receipt of remuneration from third parties, or the provision of any other benefit (including receiving hospitality and gifts or any form of 'benefit in kind', for which there is a separate Learners' Trust policy which details the necessary processes in these instances) which could compromise their impartiality in decision making surrounding both the individual school and the Trust as a whole.

If, when every reasonable attempt to resolve the matter has been undertaken, agreement cannot be reached between the members of the School Champions Board, the School's Senior Staff and/or Trust Partner, it shall be referred to the Trustees for their determination.

Section 7a: iAbacus – The Local Board has a professional clerk who has a good understanding of the statutory context in which the school operates
Section 7b: iAbacus – The Clerk produces accurate and timely minutes and has access to procedural advice and support

7.1 Clerking and Minutes

Throughout the academic year 2024/25 the Learners' Trust will have a centralised clerking offer in place through School Business Partners. Andrew Blench (admin@schoolbusinesspartner.co.uk) is the key contact for the service and he is able to offer procedural advice and support to clerks, headteachers and Champions Boards. Beyond this Trust Partners, the wider Executive team and specialist organisations for which the Trust holds subscriptions (such as the National Governance Association (NGA)) are on-hand to offer support and advice to School Champions.

Schools have delegated decision making powers over whether they'd like to continue with their locally employed Clerk, or whether they'd like to join with the centralised offer. Most schools within the Learners' Trust have signed into the centralised option for the academic year 2024/25.

The minutes of the proceedings of a meeting of the School Champions Board shall be noted and written up by the nominated Clerk. They will then be circulated to both the Headteacher and Trust Partner for an initial factual accuracy and style check, before going in front of the full School Champions Board for approval at the next meeting. The Clerk will arrange for the minutes to be shared with the school, the Champions and the relevant Trust Partner. Once formally approved by the School Champions Board (and signed by the Chair of Champions) they can be stored either with the service or within the school. There is no expectation from the Trust that Champions Board minutes be published on the website, however they need to be accessible if, for instance, the school received a subject-access request (SAR) from a member of the community for them.

The minutes shall include, but not be limited to, a record of:

- all appointments of officers made by the School Champions Board;
- all proceedings at meetings of the School Champions and of committees of the School Champions, including the names of all persons present at each such meeting. For the purpose of taking minutes, it may be necessary to anonymise questions asked to 'School Champion' (recorded as 'SC'), rather than an individual's name. However, this in no way compromises the need to write in full the names of the people attending specific meetings.



Minutes will be recorded in a consistent format used throughout the Trust which is designed to be clear, concise, transparent, accessible and, where appropriate, readily available to the relevant stakeholders and general public. For each agenda item there will be a presentation of the item using the Trust slideshow format, supporting resources (ordinarily iAbacus and/or Basecamp), followed by both support and challenge from the School Champions Board. The School Champions Board will be encouraged to ask questions, seek and collect further information in order to triangulate the evidence available to them, as well as offer supportive 'critical friendship' to the Headteacher, Trust Partner and one another.

Section 8: iAbacus - Meetings are effectively chaired by a nominated, non-Trust employed, member of the Local Board

8.1 The Chair of the Champions Board

Ordinarily the Chair (and Vice-Chair) of Champions will be elected at the first meeting of the year as part of the AGM. Within Learners' Trust, where no Chair is elected or present, the academy's Trust Partner may act as temporary Chair until a new Chair can be elected. This is not a desirable position and shouldn't be considered as a long-term sustainable solution to that particular School Champions Board. Where no Chair comes forward over-time, and/or if a Champions Board lacks representation in terms of people wishing to undertake the role (indicative timescales would be that the Champions Board has not met quorum for three successive meetings, or for a period of six months), the Trustees reserve the right to temporarily suspend the Champions Board until such a point that it can re-start. In the absence of the Chair an ad hoc Chair should be elected for the meeting providing the meeting is quorate. Detailed information about this process is given under the heading ***2a.3 'The temporary suspension of the Champions Board.'***

Section 9a: iAbacus – The Local Board receives a headteacher report that informs their knowledge so that they have a greater overall understanding of the leadership within the school

9a.1 Trust-wide sources of evidence that can be utilised to support Champion's knowledge about leadership

Below are the iAbacus headings which should be used to report on leadership. Headteachers are required to use the standardised Trust slideshow for each meeting. Alongside this slideshow, the **blue brackets** are the supplementary sources of evidence that headteachers should utilise to report (wherever possible 'by exception') to the Champions Board:

- Leadership and Policy (**Vision, aims, values document or equivalent, Trust Staffing Structure document**)
- Governance (School Champions Board) (**School Champions Handbook materials**)
- Safeguarding (**Trust Safeguarding Report, S175 document, NSPCC audit or equivalent**)
- HR/Staffing (**Trust Staffing Structure document, anonymised HR absence management reports by exception and where possible, without compromising confidentiality**)
- Finance (**Monthly management 'Flash' reports and headlines from financial reports in conjunction with the designated Trust Business Manager**)
- Premises (**By exception and based upon specialist advice, for instance AdRad or other condition surveys**)
- Pupil Satisfaction (**Pupil surveys, infographics, other pupil voice activity**)
- Staff Satisfaction (**Staff surveys, infographics, other staff voice activity such as staff forum**)
- Parent Satisfaction (**Parent surveys, infographics, other parent voice activity such as parent forum**)

Section 9b: iAbacus - The Local Board receives a headteacher report that informs their knowledge so that they have a greater overall understanding of the standards within the school

9b.1 Trust-wide sources of evidence that can be utilised to support Champion's knowledge about standards

Below are the iAbacus headings which should be used to report on standards. Headteachers are required to use the standardised Trust slideshow for each meeting. Alongside this slideshow, the **blue brackets** are the supplementary sources of evidence that headteachers should utilise to report (wherever possible 'by exception') to the Champions Board:

:

- Attendance (**RM Integris 'Herringbone' headlines, Basecamp monitoring**)
- Behaviour (**anonymised CPOMs, categories of incidents, suspension and exclusion records**)

- 
- Curriculum ([Trust knowledge and skills progression, Curriculum Policy](#))
 - Teaching and Learning ([Walkthrus, model policy for Teaching and Learning](#))
 - Pupil Premium ([Pupil Premium website report](#))
 - SEND/Inclusion ([Provision Mapper software, Hello Data](#))
 - Sports Premium ([Sport Premium website report](#))
 - Outcomes – EYFS ([Credible Plans, Hello Data](#))
 - Outcomes – Phonics ([Credible Plans, Hello Data](#))
 - Outcomes – KS1 ([Credible Plans, Hello Data](#))
 - Outcomes – KS2 ([Credible Plans, Hello Data](#))

Section 9c: iAbacus - The Local Board provides support and challenge in order to gain a greater understanding of the school's leadership/standards provision

9c.1 Following a line of enquiry or interest as a School Champion

The recommendations within this handbook are clear that there should be two Leadership and two Standards Champions meetings throughout the course of one academic year. However, Champions are entitled to carry one or two iAbacus 'beads' of interest into the next meeting for further exploration (not a supplementary meeting, this would be within one of the four pre-planned calendared events). For instance:

Scenario i) Leadership meeting

The headteacher and Trust Business Manager are jointly reporting on the 'Finance bead' to Champions. The Champions ask questions and are interested in seeing how proposed temporary staffing changes will impact upon the in-year balance of the school over the next few months. At the end of the meeting the Chair of Champions requests that the 'Finance bead' be carried to the Standards agenda next time and is reported on during the next meeting. This approach allows Champions to be informed about how the staff changes played out in reality and how they actually impacted upon the in-year financial position of the school against the projections that were shared with them in the first meeting.

Scenario ii) Standards meeting

The headteacher is reporting on the 'Curriculum bead' to Champions. A discussion takes place about Curriculum Impact Reviews (CIR) and a Champion asks whether they could come into school to help support the upcoming History review as History is a subject that interests them. It is agreed and the 'Curriculum bead' is carried to the next Leadership meeting so that the School Champion can report back their first-hand findings about the History CIR that they participated in.

9c.2 The role of the Trust Partner in working alongside School Champions

Trust Partners have responsibility for multiple schools and it is therefore unreasonable to expect them to be at every meeting of the School Champions. The expectation is that Trust Partners should be in attendance for at least part of one meeting, per full term. Agendas can be arranged so that Trust



Partners can attend the items that are relevant to them at the start of the meeting and then leave. School Champions retain the right to ask for the Trust Partner to be present for specific meetings or to provide information on specific items and the Trust Partner should seek to meet reasonable requests wherever possible.

Trust Partners are responsible for ensuring that all aspects of iAbacus are kept up to date. Headteachers are responsible for the production, collation and distribution of supporting slideshow reports and documentation. Where appropriate and sensible, aspects of this work can be delegated to the Clerk and/or administrative staff within the school.

Where possible, meetings should be focused and have consideration for the work/life balance of all concerned. Amongst some of the reasonable adjustments that can be made are: meetings taking place in the working day, meetings taking place in the very early evening, meetings that focus on a small number of items in detail and utilise 'reporting by exception' to avoid duplication of previous meetings.

9c.3 The role of the Trust Partner in School Staff and Headteacher Appraisal

The Trust Partner would usually have limited operational involvement in the appraisal process for teaching and non-teaching staff within any particular school setting. At a strategic level, they may well discuss emergent themes for staff appraisal with the headteacher, or talk about ways in which objectives can be 'differentiated' so that they are commensurate with pay, job role, career stage and contractual information (for instance, whether an employee is part-time or full-time). The headteacher has delegated responsibility to ensure that staff appraisal is in place: that it is monitored and reviewed regularly and that appropriate support and challenge is given to individuals to enable them to achieve their objectives. Decisions around singular, incremental pay rises within the specified pay range are delegated to the headteacher. Whilst School Champions may be informed of the numbers of staff making the next incremental pay-step (e.g. three staff have moved to M5), the final ratification of this is conducted between the headteacher and the school's Trust Partner. Quality assurance mechanisms are primarily from the line-management systems within the school. The headteacher must seek approval from the Trust Partner when it comes to 'exceptional circumstances.' For instance, double incremental rises, fast-track progression into UPS1 etc. The Trust Partner, in conjunction with the Executive Team will then determine the next suitable steps, against the background of school context, the evidence the employee has available and any other relevant information that can inform the final judgement.



The Trust Partner has delegated responsibility (outlined in the most recent iteration of the Scheme of Delegation) to conduct the headteacher's appraisal as part of the weekly, school meeting. Good practice would dictate that the Trust Partner would notify the headteacher about the structure, content and date of the appraisal meeting at least five working days in advance. School Champions may have discretionary, rather than mandatory, involvement as part of the *process*. The *process*, rather than the objectives themselves may be shared with School Champions at the next meeting. The School Champions responsibility is in terms of monitoring the process to gain a greater understanding of how this aspect of appraisal works. Matters relating to either the *content or outcome* of the process rest with the full Board of Trustees. Operationally, final decisions around singular, incremental pay rises within the specified pay range are delegated to the Trust Partner, and are subsequently ratified by the Board of Trustees. The quality assurance of headteacher appraisal is then done through the Executive Team meetings, with challenge and support coming from the CEO and other Trust Partners that were not directly involved in the original setting of that particular headteacher's objectives. Very occasionally there may be cases that fall outside of this. These cases may require further intervention from the full Board of Trustees. The Trust Partner has a duty to report exceptional cases to the Board of Trustees. In the case of exceptional circumstance, the Board of Trustees would be asked to make a final decision on the matter and adjudicate on unresolved differences of opinion. Exceptional circumstances are not limited to, but may include: incremental pay point rises of more than one standard Leadership spine increment; disputes between the headteacher and Trust Partner about the objectives set, or whether pay progression is or isn't justified; headteacher pay that falls outside of the defined range specified for that particular school as determined by the Chief Financial Officer and HR representative, and so forth.



Section 10: Those involved with local accountability are confident that the school is tackling weakness at an appropriate pace and providing value for money

10.1 Triangulating information as a Champion

Through the blend of the four Standards and Leadership meetings throughout the academic year, Champions will get a sense of where ‘weakness’ or areas for improvement exist within any given school’s provision or educational offer. In terms of gathering a consolidated view on the pace at which weaknesses are addressed, questions to both the headteacher and Trust Partner on this are entirely reasonable. Champions also have the chance to revisit iAbacus beads on an ongoing basis (see Section 9c.1 ‘Following a line of enquiry or interest as a School Champion’) so that they can be reassured that any issues that have arisen are being dealt with in a timely and effective way.

The primary responsibility for reporting financial matters to School Champions is sits with the headteacher, who may be supported by the centrally employed Trust Business Manager. Through the monitoring and triangulation of this evidential-information, School Champions will be well-placed to provide support and challenge around ‘value for money’.



Appendix 1

Model Agendas



SCHOOL NAME

ANNUAL GENERAL MEETING – TERM 1

DATE @ TIME

		Present	Apologies
In attendance:			
Minutes taken by:			

Agenda Item
1. Welcome
2. Apologies for Absence
3. Membership of the School Champions • Staff Representation • Parent Representation • Co-opted Champions • Election of Chair • Election of Vice-Chair
4. Board Code of Conduct (Policy Document)
5. Date & time of meetings across the year (Meeting Calendar) – 2 X Standards, 2 x Leadership.
6. Register of Business Interest (Business Interest Forms) Declaration of interest in any of the agenda items for this meeting
7. Minutes of Previous Meeting • Amendments and acceptance of minutes previous meeting • Matters arising from the minutes • Chair to sign accepted minutes
8. Any Other Business • Leadership Support from the Trust –Trust Partner Allocation • Confirmation of key personnel (HR, Trust Business Manager, IT, Facilities, Administration staff) Declaration of confidentiality
Meeting Closed:
Date and time of next meeting:



SCHOOL NAME

STANDARDS MEETING (TERMS 1 AND 4)

DATE @ TIME

		Present	Apologies
In attendance:			
Minutes taken by:			

Agenda Item
1. Welcome
2. Apologies for Absence
3. Register of Business Interests Declaration of interest in any of the agenda items for this meeting
4. Minutes of Previous Meeting Amendments and acceptance of minutes previous meeting Matters arising from the minutes Chair to sign accepted minutes
5. Headteacher report (Standards). - To include a strategic update on: - Attendance - Behaviour - Curriculum - Teaching and Learning - Pupil Premium - SEND/Inclusion - Sports Premium - Outcomes - EYFS - Outcomes - Phonics - Outcomes – KS1 - Outcomes – KS2
6. Board Challenge (taken from iAbacus 'hindering factors') for up to 2 priority areas; 6.1 TBC - iAbacus Framework statement: 6.2TBC - iAbacus Framework statement:
7. Questions from the Trust and for the Trust
8. What have we achieved today that has helped our school?
9. Any Other Business
Date & time of meeting
Meeting Closed



SCHOOL NAME

LEADERSHIP MEETING (TERMS 2 AND 6)

DATE @ TIME

		Present	Apologies
In attendance:			
Minutes taken by:			

Agenda Item

1. Welcome

2. Apologies for Absence

3. Register of Business Interests

Declaration of interest in any of the agenda items for this meeting

4. Minutes of Previous Meeting

Amendments and acceptance of minutes previous meeting

Matters arising from the minutes

Chair to sign accepted minutes

5. Headteacher report (Leadership).

- To include a strategic update on:
 - Leadership and Policy
 - Governance (School Champions Board)
 - Safeguarding
 - HR/Staffing
 - Finance
 - Premises
 - Pupil Satisfaction
 - Staff Satisfaction
 - Parent Satisfaction

6. Board Challenge (taken from iAbacus 'hindering factors') for up to 2 priority areas;

6.1 TBC

- iAbacus Framework statement:

6.2TBC

- iAbacus Framework statement:

7. Questions from the Trust and for the Trust

8. What have we achieved today that has helped our school?

9. Any Other Business

10. Date & time of meeting

Meeting Closed



Appendix 2

Key Documents

School Champions Membership of the School Champions – Example

The School Champions shall consist of at least:

1 Head Teacher	1 Staff Representative
1 Parent Representative	1 Co-Opted board members (including any Trustee members)
The total number of School Champions members is X	The term of office is 4 years
Quorum for full School Champions meetings is 50% of board members (not including paid LT staff)	

Forename	Surname	Category	Appointing Body	Term of Office Start Date-End Date	
		Headteacher	Trustees		
		Staff	School Champions		
		Parent	School Champions		
		Co-opted (Trust Partner)	Trustees		
		Co-opted	Trustees		
		Co-opted	School Champions		

Chair of the School Champions is:

In the absence of the Chair, the school's Trust Partner will act as temporary Chair.

This instrument of organisation came into effect:



Example Primary School: LEARNERS' Trust School Champions - Meeting Timetable						
	Term 1	Term 2	Term 3	Term 4	Term 5	Term 6
Meeting Schedule	AGM Meeting TBC @ 4:00 p.m. Standards Meeting TBC @ 4:30 p.m.	Leadership Meeting TBC @ 2:00 p.m.		Standards Meeting TBC @ 2:00 p.m.		Leadership Meeting TBC @ 4:00 p.m.



REGISTER OF CHAMPION/STAFF BUSINESS AND PERSONAL INTERESTS

The Academies Handbook requires that each Academy Trust establish a register of business interest which lists for each Champions, any business or personal interests they or any member of their immediate family have which could conflict with the school's interests; to keep the register up to date with notification of changes and through an annual review of entries, and to make the register available for inspection. Best practice states that the Senior Leadership Team, and all significant budget holders should also complete this register.

For register purposes a close relative is defined as a spouse, parent, sibling, son, daughter, common law partner or other close relative. As a general principle, Champions and staff should err on the side of caution and declare interests that they think could be covered by the guidance above. Such a declaration must be made as soon as a member of staff becomes aware of the possibility of any such conflict arising or indeed that may be perceived / construed as arising. A good test is for the member of staff to ask himself / herself whether others would think that the interest is of a kind to make this possible. If the member of staff thinks this is so or is in doubt than the information should be recorded on the register of interests.

Please note all Champions, members of the Senior Leadership Team, and budget holders (over £5,000) should sign and return this form even if they have no interests to declare.

PLEASE ENSURE THIS FORM IS RETURNED TO THE TRUST FOR RETENTION

School: Learners' Trust

1. Involvement in companies: includes, for example, directorships and company secretary, employee, or any other position where a person is actively involved in the running of a company's affairs, where the company has, or may have, a contractual relationship with the school. (Staff must declare any financial interests which could conflict with the school's interests; e.g. work for which a fee is received).

Company / Position:

2. Other personal interests: Staff must declare any non-financial interests that they consider conflict with the school's interests, for example, if they are involved in an official capacity with an outside organisation which has dealings with the school or if a member of their immediate family works or applies for a post in the school.

Details:

3. The holding of shares or other securities, in a company or other body with whom the school contracts or is considering contracting, should be declared if the holding exceeds £25,000 is more than 1/100th of the nominal value of the issued share capital, whichever is less, The size and nature of the holding need not be declared, simply the name of the company. This requirement does not extend to banks or building societies.

Details:

4. The intention to bid for the purchase of land or property owned by the school or Trust.

Details:



Code of Conduct for School Champions

This code sets out the expectations on and commitment required from School Champions and Trustees in order for the governance function of Learners' Trust to properly carry out its work within the school/s and the communities that surround them.

Once approved by the board of Trustees, the Code will apply to all School Champions Boards.

This Code should be read in conjunction with the relevant law and for academies, their articles of association and agreed Scheme of Delegation for Learners' Trust.

Monitoring and Review

This policy is reviewed annually by the Board of Trustees of The Learners' Trust. Any changes made to this policy by the Board of Trustees will be communicated to all School Champions.

All members of Trustees and School Champions are required to familiarise themselves with all processes and procedures outlined in this policy as part of their induction programme.

The next scheduled review date for this policy is December 2025.

	Chair of Trustees	Date:	2024-25
--	-------------------	-------	---------



We agree to abide by the Seven Nolan Principles of Public Life:

Selflessness

We will act solely in terms of the public interest.

Integrity

We will avoid placing ourselves under any obligation to people or organisations that might try inappropriately to influence us in our work. We will not act or take decisions in order to gain financial or other material benefits for ourselves, our family, or our friends. We will declare and resolve any interests and relationships.

Objectivity

We will act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.

Accountability

We are accountable to the public for our decisions and actions and will submit ourselves to the scrutiny necessary to ensure this.

Openness

We will act and take decisions in an open and transparent manner. Information will not be withheld from the public unless there are clear and lawful reasons for so doing.

Honesty

We will be truthful.

Leadership

We will exhibit these principles in our own behaviour. We will actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs.

We will focus on our core governance function:

The core function of a School Champion is to
monitor an aspect of the school's work to gain a further understanding of it, in order to provide a
platform for support and challenge.

As Champions, we agree to:

Fulfil our role & responsibilities

1. We accept that our role is strategic and so will focus on our core functions rather than involve ourselves in day-to-day management.
2. We will fulfil our role and responsibilities as set out in our scheme of delegation.
3. We will develop, share and live the ethos and values of our school/s.
4. We agree to adhere to school/trust policies and procedures as set out by the relevant governing documents and law.
5. We will work collectively for the benefit of the school/s.
6. We will be candid but constructive and respectful when holding senior leaders to account.
7. Where actions conflict with the Seven Principles of Public Life or may place pupils at risk, we will speak up and bring this to the attention of the relevant authorities.
8. We will only speak or act on behalf of the Champions board if we have the authority to do so.
9. We will fulfil our responsibilities as a good employer, acting fairly and without prejudice.
10. We will strive to uphold the school's / trust's reputation in our private communications (including on social media).
11. We will not discriminate against anyone and will work to advance equality of opportunity for all.

Demonstrate our commitment to the role

1. We will involve ourselves actively in the work of the Champions board.

2. We will make every effort to attend all meetings and where we cannot attend explain in advance why we are unable to.
3. We will arrive at meetings prepared, having read all papers in advance, ready to make a positive contribution and observe protocol.
4. We will get to know the school/s well and respond to opportunities to involve ourselves in school activities.
5. We will visit the school/s and when doing so will make arrangements with relevant staff in advance and observe school and board protocol.
6. When visiting the school in a personal capacity (for example, as a parent or carer), we will continue to honour the commitments made in this code.
7. We will participate in induction training and take responsibility for developing our individual and collective skills and knowledge on an ongoing basis.

Build and maintain relationships

1. We will develop effective working relationships with school leaders, staff, parents and other relevant stakeholders from our local community/communities.
2. We will express views openly, courteously and respectfully in all our communications with board members and staff both inside and outside of meetings.
3. We will work to create an inclusive environment where each board member's contributions are valued equally.
4. We will support the chair in their role of leading the board and ensuring appropriate conduct.

Respect confidentiality

1. We will observe complete confidentiality both inside and outside of school when matters are deemed confidential or where they concern individual staff, pupils or families.
2. We will ensure all confidential papers are held and disposed of appropriately.
3. We will maintain confidentiality even after we leave office.

Declare conflicts of interest and be transparent

1. We will declare any business, personal or other interest that we have in connection with the board's business, and these will be recorded in the register of business interests.
2. We will also declare any conflict of loyalty at the start of any meeting should the need arise.
3. If a conflicted matter arises in a meeting, we will offer to leave the meeting for the duration of the discussion and any subsequent vote.
4. We accept that the Register of Business Interests will be published on the school/trust's website.
5. We will act in the best interests of the school/trust as a whole and not as a representative of any group.
6. We accept that in the interests of open governance, our full names, date of appointment, terms of office, roles on the governing board, attendance records, relevant business and pecuniary interests, category of governor/trustee and the body responsible for appointing us will be published on the school/trust website.
7. We accept that information relating to board members will be collected and recorded on the DfE's national database (Get information about schools), some of which will be publicly available.

We understand that potential or perceived breaches of this code will be taken seriously and that a breach could lead to formal sanctions.

Adopted by: [Name of Champions Board] on [date]

Signed: [Chair of Board]



School Champions Board Attendance

School:

Meeting Date	Type of Meeting	School Champions' Names							
		Name	Name	Name	Name	Name	Name	Name	Name
	AGM	✓							
	Standards								
	Leadership								
	Standards								
	Leadership								
Total Number of Meetings Attended									



Champions Boards Skills Audit – adapted from the National Governance Association (NGA) materials

How to complete this audit

1. Enter your scores (1 to 4) or comments (where prompted) into the highlighted boxes below.

Refer to the guidance notes provided within this document to complete the audit.

2. Reflect on your responses: can you identify any areas where you need to prioritise further development? The guidance provided includes links to helpful resources.

Your chair and governance professional (clerk to the board) will also be able to help you access training and development.

3. The scores should then be collated and evaluated.

	Statement	Enter a score (1 to 4) below 1 = strong disagreement 4 = strong agreement
1	I have governing experience in a school or in a different sector	
2	I am/have been chair of a board or committee	
3	I have experience and expertise in developing a strategy	
4	I know what the school's strategic priorities are	
5	I can identify key risks and evaluate their potential impact	
6	I am aware of how the school is funded and what the funding is spent on	
7	I can interpret budget monitoring reports and ask relevant questions	
8	I understand how the school's curriculum meets the needs of all pupils	
9	I understand how my Champions board engages with stakeholders – pupils, parents, staff and the wider community – and how this informs decisions	
10	I feel confident being part of the panel that conducts headteacher appraisal	
11	I know how to build the knowledge I need to be effective in my role as a School Champion	
12	I can build positive, collaborative relationships with members of the Champions board	
13	I understand the nature of the board's role and what Champions boards and school leaders should expect from each other.	
14	I know what the Champions board's core functions are (as set out in the Scheme of Delegation)	
15	I understand how the Champions board distributes its work across its membership	
16	I feel confident being part of a panel to make decisions (such as on pupil exclusions)	
17	I know how the Champions board meets its legal and compliance responsibilities	
18	I feel able to speak up if I am concerned about non-compliance and unethical behaviour	
19	I can identify when independent, expert advice may be required	
20	I know and empathise with the community served by the school	
21	I understand the legal responsibilities of Champions boards in relation to equalities.	

22	I have influenced an organisation's culture of equality and diversity (through communication, appropriate challenge, awareness raising or developing policies and practices).	
23	I have knowledge, experience or training that will help me to promote diversity and inclusion.	
24	I can recognise and challenge behaviour, attitudes, policy and practice which go against the inclusive culture we want for our school.	
25	I understand how to use relevant data and insight to identify and resolve issues relating to inequality.	
26	Is there any support or training you would like to engage in to help you promote equality and diversity in your school?	<i>[Insert comments here]</i>
27	What are the areas you feel you need to prioritise to develop your governance knowledge and skills?	<i>[Insert comments here]</i>
28	Are there any additional areas of the Champions board's responsibilities which you would like to contribute to in the future?	<i>[Insert comments here]</i>
29	OPTIONAL: Do you have any further comments on your development needs and or your continuing contribution to the Champions board?	<i>[Insert comments here]</i>



Skills audit guidance notes

This guidance is provided to support accurate and consistent scoring of skills audit statements.

Section 1a. Strategic leadership

The following statements relate to the core function of boards to set vision and strategic direction.

Statement 1

I have governing experience in a school or in a different sector

- A score of 4 means you have significant (more than 4 years') experience of governance within the schools sector (on a school or academy trust board).
- 3 means you have up to 4 years' experience governing within the schools sector or more than 4 years' experience governing in a different sector (such as director of a charity or limited company).
- 2 means you have more limited governing experience outside the school sector.
- Provide a score of 1 if you have no prior governing experience.

Statement 2

I am/have been chair of a board or committee

- A score of 4 means you have more than 4 years' experience of chairing governing boards and or committees in schools or academy trusts.
- 2 or 3 (depending on the type and extent of your experience) means you have some chairing experience, including being a vice chair or acting as chair for meetings. Relevant experience also includes chairing a board or committee outside the schools sector (which has common traits such as working with executives and navigating procedures).
- 1 means you have no chairing experience.

Statement 3

I have experience and expertise in developing a strategy

Developing a [medium to long-term strategy](#) for any organisation requires: risk management; identification of key performance indicators and deciding how they will be monitored; and consideration of stakeholder (pupils, staff, families and the wider community) views.

- A score of 4 means you have experience of strategy development in a school. For example, you have led a governing board strategy development day.
- 3 means you have experience of strategy development at the same level outside the schools sector.
- 2 means your experience is less extensive.
- 1 means you have no experience of developing a strategy.

Statement 4

I know what the school's strategic priorities are

- A score of 4 means you know what your school's strategic priorities are, what they mean for pupils and other stakeholders, and can confidently discuss these priorities with others.
- 2 or 3 (depending on the level of your understanding) means you are aware of your school's strategic priorities but don't feel confident discussing them.

- 1 means you don't know what your strategic priorities are – perhaps because you have recently joined the board or because you haven't been involved in developing the strategy.

Statement 5

I can identify key risks and evaluate their potential impact

Risk evaluation and management help ensure strategic priorities are met. Our [risk management guidance for NGA members](#) explains how these principles are applied in schools.

- A score of 4 means that you have experience of evaluating and managing risk in a school governance role. In particular, you have contributed to discussions about the school risk register, potential impact and mitigation of risks.
- 2 or 3 (depending on the relevance and extent of your experience) means that you have some understanding of how risk management works in practice. Reading NGA risk management guidance will help you achieve a score of 2 as a minimum.
- 1 means you have no experience of risk evaluation and management and do not feel able to contribute to such a discussion.

Section 1b. Accountability

These are the competencies that the board needs in order to hold executive leaders to account for the educational and financial performance of the organisation.

Statement 6

I am aware of how the school is funded and what the funding is spent on

School funding is largely based on pupil numbers and also includes grants such as the pupil premium.

- A score of 4 means you have a good understanding of how funding is allocated under different budget headings and how spending impacts on pupil outcomes.
- 2 or 3 means you have some awareness of your school's funding and how this is allocated but you would not feel confident providing examples of how spending impacts on pupil outcomes.
- 1 means you are not aware of what the key information is.

Statement 7

I can interpret budget monitoring reports and ask relevant questions

Governing boards (finance/resources committees in particular) should receive budget monitoring reports from their headteacher and or school business professional.

- A score of 4 means you can confidently use these reports to ask relevant questions which help provide assurance that the budget is being managed effectively. Your questions focus on any changes to planned spending and the explanations for such changes.
- 2 or 3 (depending on the relevance and extent of your experience) means you have evaluated financial data in a school or another organisation, and this experience informs your contribution to finance and budget discussions in meetings.
- A score of 1 means that you have no experience of using financial data and so do not yet feel able to contribute to relevant discussions.

Statement 8

I understand how the school's curriculum meets the needs of all pupils

Influencing curriculum policy (as opposed to the way in which pupils are taught), is a fundamental part of the board's role. You can read about the content of your school's curriculum on their website.

- A score of 4 means you have read and understood the curriculum content and feel confident discussing this with colleagues.
- 2 or 3 means you have read the curriculum content but do not yet feel confident discussing this with others.
- 1 means you are not aware of what the curriculum content is.

Statement 9

I understand how my Champions board engages with stakeholders – pupils, parents, staff and the wider community – and how this informs decisions

- A score of 4 means you have been involved in your board's stakeholder engagement activity, which may include: evaluating parent survey responses, attending parent and pupil forums, or meeting with staff and outside organisations (such as the local authority).
- 3 means you have experience of stakeholder engagement on another governing board.
- 2 means you have experience of stakeholder engagement outside of the schools sector.
- 1 means you have no experience of stakeholder engagement.

Statement 10

I feel confident being part of the panel that conducts headteacher appraisal

- A score of 4 means you have been a member of the panel that conducts the headteacher's annual appraisal in a school.
- 2 or 3 (depending on your level of experience) means you have conducted an appraisal in an organisation outside the schools sector.
- 1 means that you have not been part of an appraisal process.

Section 1c. People

People that govern need to form positive working relationships with their colleagues to function well as part of a team.

Statement 11

I know how to build the knowledge I need to be effective in my role as a School Champion

- A score of 4 means you are proactive in ensuring that your development needs are met through courses, e-learning, reading resources or networking. Your induction should provide an essential starting point.
- 2 or 3 means you have identified knowledge or skills gaps but have not yet engaged in or planned relevant development activity.
- 1 means you have not yet identified knowledge or skills gaps and have not engaged in development activity.

Statement 12

I can build positive, collaborative relationships with members of my Champions board

A score of 4 means that you:

- are willing to share the workload
- welcome a range of experiences and perspectives

- feel comfortable offering up constructive challenge
 - can reach a reasonable consensus
 - seek to resolve issues that may lead to conflict
- A score of 2 or 3 means you have identified areas you would like to work on.
- 1 means that you have not yet built collaborative relationships and do not feel confident in how to achieve this.

Section 1d. Structures

Understanding governance structures is vital to avoid unclear and overlapping responsibilities that can lead to dysfunctional or ineffective governance arrangements.

Statement 13

I understand the strategic nature of the board's role and what Champions boards and school leaders should expect from each other.

[NGA guidance](#) on what governing boards and school leaders should expect from each other should be understood and applied to your own context.

- A score of 4 means you have read and understood the guidance.
- 2 or 3 means that you have read the guidance but require further clarity.
- 1 means you have not read or understood the guidance.

Statement 14

I know what the Champions board's core functions are

The core functions are:

- Ensuring clarity of vision, ethos and strategic direction;
- Holding executive leaders to account for the educational performance of the organisation and its pupils, and the effective and efficient performance management of staff; and
- Overseeing the financial performance of the organisation and making sure its money is well spent

NGA recognises the following as the fourth core function of governance:

- Ensuring the voices of school stakeholders are heard.

Chapter one of the [Governance Handbook](#) explains the core functions and describes the features of effective governance. If you have read and understood this chapter, provide a score of 4 for this statement.

Statement 15

I understand how the Champions board delegates its work across its members

Governing boards often delegate their work to committees, working groups, individuals (link governors/trustees), and panels (such as for headteacher appraisal).

- A score of 4 means you have good awareness and knowledge of how the Champions board distributes its work, for example, the specific responsibilities of any committees and their terms of reference.
- 2 or 3 means you have some understanding. For example, you know what committees the board has appointed but not what each one is responsible for.

- 1 means you are unaware of how your board distributes its work.

Section 1e. Compliance

All those involved in governance need to understand the legal frameworks and context in which the organisation operates, and all of the requirements with which it must comply.

Statement 16

I feel confident being part of a panel to make decisions (such as on pupil exclusions or complaints)

- A score of 4 means you have been a member of a panel where you applied relevant policy and procedure and worked with colleagues to reach a decision.
- 2 or 3 (depending on your level of confidence) means you understand how and why panels are formed and, with some support, you would feel confident being part of a panel.
- 1 means you do not feel confident being part of a panel.

Statement 17

I know how the Champions board meets its legal and compliance responsibilities

Your induction to the board (including any induction training course you attend) should provide a broad understanding of the board's legal and compliance responsibilities, such as its [safeguarding duties](#).

- A score of 4 means you have gained a detailed understanding of your board's legal and compliance responsibilities from experience of governing, attending meetings, carrying out the business of the board and undertaking further training and development activity.
- 2 or 3 means you have a lower level of knowledge and understanding.
- 1 means you have yet to gain a broad level of understanding.

Statement 18

I feel able to speak up if I am concerned about non-compliance and unethical behaviour

- A score of 4 means that, based on your experience of governance, you are able to recognise something that is not – or does not appear to be – right and raise it as an issue in an appropriate way, however challenging it may be.
- 2 or 3 means you do not feel confident in recognising and or challenging appropriately.
- 1 means you would like more support or guidance in this area.

You may wish to consult [The Framework for Ethical Leadership in Education](#).

Statement 19

I can identify when independent, expert advice may be required

Effective governing boards understand the benefit of having independent, expert advice and the risk of not having it. It is important to have regard to the advice of the board's governance professional (clerk to the board) on issues of compliance and other matters. It may also be necessary, on occasion, to seek legal, financial, or human resource advice.

- 4 means you feel confident identifying when expert advice is necessary.
- 2 or 3 means you have a lower level of confidence.
- 1 means you are unable to recognise situations where expert advice is necessary.

Section 2. Equality, diversity and inclusion

This section is about the board's role in encouraging diversity and ensuring equality: in determining ethos and culture; when recruiting executive and senior leaders; as employers of all staff; and in evaluating the impact of decisions on pupils and other stakeholders.

Statement 20

I know, and empathise with, the community served by the school

Governing boards are accountable to the communities they serve. Developing knowledge and understanding of your community means you are better placed to understand the impact of your strategy and decisions on the community.

- A score of 4 means you have knowledge and understanding of the community served by the school – its characteristics, economy and cultures – which is informed by a range of experiences such as volunteering, talking to people, and or living and working in the community.
- 2 or 3 means that your experience and understanding could be extended.
- 1 means you have not yet built a broad knowledge and understanding of the community served by the school.

Statement 21

I understand the legal responsibilities of Champions boards in relation to equalities

Governing boards have a legal duty under The Equality Act to protect pupils and staff against discrimination, harassment and or victimisation.

- A score of 4 means you have read and understood Department for Education [guidance on The Equality Act](#) (and or NGA [Equality and diversity guidance](#)).
- 2 or 3 means you have some understanding of the responsibilities that schools have under The Act but require further clarity.
- 1 means you have not yet built an understanding of The Act as it applies to schools.

Statement 22

I have influenced an organisation's culture of equality and diversity (through communication, appropriate challenge, awareness raising or developing policies and practices)

Culture – the way things get done around here – is what makes a school or trust unique. Culture influences behaviour and practices and so is a crucial component of implementing a vision and strategy. The policies that governing boards adopt influence culture in their school.

- A score of 4 means you have tangibly influenced an organisation's (not necessarily within a school) culture of equality and diversity. Examples include being part of a working group for creating more flexible, family friendly working practices or helping to design a work environment that is more accessible.
- 2 or 3 means you have not tangibly influenced an organisation's culture but recognise the ways in which this is achieved.
- 1 means you have yet to build an understanding of how organisations develop and maintain a culture of equality and diversity.

Statement 23

I have knowledge, experience or training that will help me to promote diversity and inclusion

An example is training on unconscious bias (beliefs and views about other people that might not be right or reasonable).

- A score of 4 means you can confidently contribute to discussions and actions that promote diversity and inclusion. You may have increased your knowledge and understanding through personal experience or by participating in a range of training and development (such as using books, podcasts and mentoring) to gain authentic insight.
- 2 or 3 means you have some knowledge or experience in this area but do not yet feel able to contribute to discussions or suggest appropriate actions.
- 1 means you have not engaged in relevant development activity and do not feel able to contribute to discussions.

Statement 24

I can recognise and challenge behaviour, attitudes, policy and practice which go against the inclusive culture we want for our school

- A score of 4 means you are confident to engage in constructive dialogue over decisions, expectations, attitudes, assumptions or language that, whether intentional or not, could result in individuals or groups being disadvantaged or marginalised.
- 2 or 3 means you have a lower level of confidence.
- 1 means you would benefit from development, support or guidance in this area.

Statement 25

I understand how to use relevant data and insight to identify and resolve issues relating to inequality

Data and insight help governing boards to explore issues, verify evidence and question any discrepancies. Examples include data on exclusions, recruitment, and career progression of different groups.

- A score of 4 means you have used data or insight to identify issues of inequality and affect positive change.
- 2 or 3 means you have limited or indirect experience of using data or insight for this purpose but are aware of its importance.
- 1 means you have not yet built an understanding of how and why data can be used to identify, promote and resolve issues of inequality.

Statement 26

Is there any support or training you would like to engage in to help you promote equality and diversity in your school?

Reflect on the scores you have provided for statements 18 to 23. What do you think will have the biggest impact on your contribution. This could include:

- Mentoring and coaching
- Specific training (such as unconscious bias training)
- Reading
- General awareness raising
- A whole board approach (such as a diversity and inclusion workshop)

Section 3. Self-evaluation

Reflect on your contribution to your governance role and identify further development opportunities.

Statement 27

What are the areas you need to prioritise to develop your governance knowledge and skills?

Reflect on your responses to this audit as well as any previous conversations about your governance development. What do think will have the biggest impact over the next 12 months? For example:

- Completing your induction (if relevant).
- Continuing professional development in specific areas of responsibility (for example, if you have responsibility for pupil premium, this might be an area you'd like to build a greater understanding of).
- Mentoring and support from within the board.

Statement 28

Are there any additional areas of the board's responsibilities which you would like to contribute to in the future?

- Do you have any specific skills or experience that you think could be utilised by the board?
- Are there specific areas or committees you would like to become more involved in?
- Would you like to take on a leadership role within the governing board (such as chairing a committee or a link governor/trustee role)?

Statement 29 (optional)

Do you have any further comments on your development needs and or your continuing contribution to the Champions board?



Champions Boards Election documents – adapted from the National Governance Association (NGA) materials

Model nomination letter

Dear Parent/Carer,

I am writing to you to invite you to stand for election as a School Champions or to nominate another parent to do so. We currently have <insert number> vacancies and the term of office is <insert number of years>.

The role of the Champions Board

The core function of a School Champion is to monitor an aspect of the school's work to gain a further understanding of it, in order to provide a platform for support and challenge.

Who can apply?

To be able to volunteer, you need to be a parent, carer (or someone who has parental responsibility) for a child at <school>. You do not need any specific qualifications, but need to demonstrate the skills and expertise you could potentially bring to the Champions Board. The enclosed sheet summarises the circumstances under which someone cannot serve as a School Champion.

To fulfil the role, you will need to:

- attend regular meetings (around 4 each year)
- visit the school occasionally
- do some background reading
- take part in induction training and ongoing development (which will be provided for you)

Every school Champions board needs a balance and diversity of knowledge, skills and experience. The Champions board would welcome applications from:

- <insert skills and or characteristics such as age group or ethnicity>

How to apply

If you would like to apply, please complete the enclosed nomination form and return it to <insert details> by <insert date>. If you are putting someone else forward for nomination, please make sure they are happy for you to do so.

If there are more nominations than vacancies, we will conduct a secret ballot. If that is necessary, voting papers and instructions will be sent to all parents and carers.

Yours faithfully,

Returning Officer/Headteacher/Chair of Champions

Qualifications and disqualifications to serve as a School Champion:

A School Champion must be aged 18 or over at the time of his/her election or appointment and cannot hold more than one governance role at the same school.

A person is disqualified from election or appointment as a parent Champion if s/he:

- is employed at the school for more than 500 hours in any 12 consecutive months;

A person is disqualified from holding or continuing to hold office as a School Champion if s/he:

- is a registered pupil at the school;
- has failed to attend School Champion meetings at the school without the consent of the Champions Board, for a continuous period of six months;
- has been disqualified for failing to attend School Champion meetings at the school without the consent of the School Champions Board, for a continuous period of six months whilst serving as a co-opted School Champion at the school in the last 12 months;
- has had his/her estate sequestrated and the sequestration has not been discharged, annulled or reduced;
- is subject to a bankruptcy restriction order, an interim bankruptcy restrictions order, a debt relief restrictions order or an interim debt relief restrictions order;
- is subject to:
 - a disqualification order or disqualification undertaking under the Company Directors Disqualification Act 1986
 - a disqualification order under the Companies Directors Disqualification (Northern Ireland) Order 2002
 - a disqualification undertaking accepted under the Company Directors Disqualification (Northern Ireland) Order 2002
 - an order made under section 429(2)(b) of the Insolvency Act 1986 (failure to pay under a county court administration order);
- has been removed from the office of charity trustee or trustee for a charity by an order made by the Charity Commission or Commissioners or High Court on the grounds of any misconduct or mismanagement in the administration of the charity for which s/he was responsible; or to which s/he was privy; or to which he contributed, or he facilitated by his conduct; or
- has been removed, under section 34 of the Charities and Trustee Investment (Scotland) Act 2005, from being concerned in the management or control of any body;
- is included in the list of people considered by the Secretary of State as unsuitable to work with children (under section 1 of the Protection of Children Act 1999);
- is subject to a direction of the Secretary of State under section 142 of the Education Act 2002 (or any other disqualification, prohibition or restriction which takes effect as if contained in such a direction);
- is subject to a direction of the Secretary of State under section 128 of the Education and Skills Act 2008;

- is barred from regulated activity relating to children in accordance with section 3(2) of the Safeguarding Vulnerable Groups Act 2006;
- is disqualified from working with children under sections 28, 29, or 29A of the Criminal Justice and Court Services Act 2000;
- is disqualified from registration under Part 2 of the Children and Families (Wales) Measure 2010 for child minding or providing day care;
- is disqualified from registration under Part 3 of the Childcare Act 2006;
- has been convicted of any offence and received a sentence of imprisonment (whether suspended or not) for a period of not less than 3 months (without the option of a fine) in the 5 years before or since becoming a School Champion;
- has been convicted of any offence and received a prison sentence of two and a half years or more in the 20 years before becoming a School Champion;
- has been convicted of any offence at any time and received a prison sentence of 5 years or more;
- has been convicted of an offence and sentenced to a fine under section 547 of EA 1996 (nuisance or disturbance on school premises) or under section 85A of the Further and Higher Education Act 1992 (nuisance or disturbance on educational premise) during the 5 years prior to or since appointment or election as a School Champion;
- has refused a request by the clerk to the School Champions to make an application under section 113B of the Police Act 1997 for a criminal records certificate.



Model nomination form

Election of: *School Champion*

Please complete this form in BLOCK CAPITALS

Nominee name: _____

Nominee contact details: _____

Nominee personal statement (maximum 250 words):

I confirm (i) that I am willing to stand for election as a School Champion and (ii) that I am not disqualified from holding office for any of the reasons set out in the qualifications and disqualifications sheet.

Nominee signature: _____

Date: _____

If you are proposing a candidate for nomination, please provide:

Proposer name and contact details: _____

Completed nomination forms must be returned to **<insert details>** by **<insert date>**



Model ballot letter

Dear Parent/Carer,

I wrote to you on **<insert date>** to invite nominations for membership of our School Champions Board.

I am delighted to say that there has been a good response and there are **<insert number>** candidates for the **<insert number>** vacancy/vacancies. This means we must now hold a ballot.

Attached to this letter is:

- a ballot paper with the names of the candidates (in alphabetical order)
- a copy of the personal statements from the candidates

You may vote for up to **<insert number equal to the number of vacancies>** of the candidates. Each parent can submit one ballot paper. As indicated on the ballot paper, you should vote by marking a single 'X' alongside the candidate(s) you support.

<Outline the procedure for submitting votes either electronically or on paper ([see guidance](#))>

The election will be decided by a simple majority of votes cast. In the event of a tie, lots will be drawn.

When the election has been completed, I will let you know the outcome. If you have any queries in the meantime, please let me know.

Yours faithfully,

Returning Officer/Headteacher/Chair of Champions



Model ballot paper

Election of *School Champion/s* at **[school]**

There are **<insert number>** of vacancies for School Champions at **[school]**.

You may vote for **<insert number>** candidate(s) by marking an X alongside their name(s). Do not mark the ballot paper in any other way.

Candidates

Candidate Name	Mark an 'X' to indicate your vote

You may choose to include candidates' personal statements within the ballot paper or provide these as a separate document.

Your name: _____

Child/Children at the school: _____



Dear Chairs of Champions Boards,

I write to you with the offer of a new opportunity that we are in the process of trialling throughout the academic year 2024/25. The Board of Trustees and the Learners' Trust Central Team are as keen as possible to connect the work of local School Champions with the Board of Trustees and vice-versa, so the following arrangement has been put in place:

What? – an invite to the Chair of each Champions Board to attend a Trustee meeting with local colleagues

On a rotational basis Chairs will be invited to attend one or more of: a Full Board meeting, Leadership and/or Standards Committee. They all take place on a Monday and begin at 5.30 p.m.

How? – by giving Chairs dates within the academic year where they may choose to observe and connect with the work of the Board of Trustees and contribute local perspectives to proceedings

Term	Term 1	Term 2	Term 3	Term 4	Term 5	Term 6
School invites go to Chairs from:	ACS BJS BMI BPS CPS CPP		EJS HGI HGJ HPS HHP MSP		NWP OHJ SIS SPJ WHP WIS	
Full Board	16/9/24 5.30 p.m. @Eckington HQ (S21 4DA)	N/A	27/1/25 5.30 p.m. @Eckington HQ (S21 4DA)	N/A	12/5/25 5.30 p.m. @Eckington HQ (S21 4DA)	N/A
Leadership	14/10/24 5.30 p.m. @Eckington HQ (S21 4DA)	N/A	N/A	10/3/25 5.30 p.m. @Eckington HQ (S21 4DA)	N/A	2/6/25 5.30 p.m. @Eckington HQ (S21 4DA)
Standards	N/A	18/11/24 5.30 p.m. @Eckington HQ (S21 4DA)	N/A	28/4/25 (technically Term 5) 5.30 p.m. @Eckington HQ (S21 4DA)	N/A	23/6/25 5.30 p.m. @Eckington HQ (S21 4DA)

School naming conventions within the Learners' Trust are:

Ashgate Croft Special School (ACS)
Brimington Manor Infant (BMI)
Catcliffe Primary (CPS)
Eckington Junior (EJS)
High Greave Junior (HGJ)
Holme Hall Primary (HHP)
New Whittington Primary (NWP)
Somercoates Infant (SIS)
Walton Holymoorside (WHP)

Brimington Junior School (BJS)
Brookfield Primary (BPS)
Chaddesden Park Primary (CPP)
High Greave Infant (HGI)
Hodthorpe Primary (HPS)
Mary Swanwick Primary (MSP).
Old Hall Junior (OHJ)
Somerlea Park Junior (SPJ)
Westfield Infant (WIS)



Steven Welsh is the Chair of the Full Board of Trustees.

Ian Levers is the Chair of the Leadership Committee of Trustees.

Jemma Monkhouse is the Chair of the Standards Committee of Trustees.

Why? – our CHOICES culture

Connected

Developing positive, well-maintained and productive relationships between School Champions and the Board of Trustees is a vital component in terms of joining all of the working parts of the MAT together.

Helpful

Looking at how local knowledge and understanding of individual school settings can support the work of the Board of Trustees is important in helping determine and shape the strategic direction of the Trust.

Organised

Providing extended notice of calendared meeting opportunities to engage with Trustees gives plenty of advance notice for Chairs of Champions to consider where they'd like to attend.

Informed

Sharing agendas, meeting slides and documentation, alongside the conversations that take place at Board of Trustee level allows Chairs of School Champions to be informed about the work of those that are responsible for governance across the Learners' Trust.

Candid

Enabling access to Trustee forums means that Chairs of Champions can be open and honest in their experiences of working as part of Learners' Trust.

Effective

Joining thinking at all levels helps support the view that the schools are the Trust and the Trust is the schools; rather than the Trust being a 'stand-alone' entity that sits entirely outside of the schools.

Simple

Navigating layers of governance can be done by viewing the Scheme of Delegation. However, the simplest way of allowing Chairs of Champions to make the connection between themselves and the Board of Trustees is giving them the opportunity to experience the content of meetings first-hand.

We look forward to welcoming and linking with as many of you along as possible throughout the academic year. Please don't hesitate to contact me at jonathan.brookes@learnerstrust.org should you have any queries or if you'd like to discuss this initiative further.

Very best wishes,

Jonathan Brookes (Trust Partner, Learners' Trust)

FAQs

Q. How many Champions can attend from our Local Board? Can I bring a few people along with me?

- Whilst the Board of Trustees is keen to listen to the thoughts and views of all School Champions the invite to Board meetings is only open to the Chair currently.

Q. In what capacity am I attending? Do I suddenly become a 'temporary Trustee' for the duration of the meeting?

- Technically, any Chair of Champion that chooses to attend a Board of Trustees meeting comes in the capacity of an **observer**. As the name suggests, they are there to observe, connect and contribute to proceedings, however they are not co-opted members of the Board of Trustees at any point in terms of voting or decision making that could take place.

Q. What are my options for joining the meeting? How long should I stay for?

- Chairs of Champions are welcome to attend either:
 - in person @Eckington HQ S214DA;or
 - via Teams (link distributed by Clerk to Board of Trustees).

Chairs of Champions can stay for as much or for as little of the meeting as they choose to.