GOVERNOR SERVICES

The Annual Schedule of Governing Board Business 2022-23

For all those involved in school governance in Oxfordshire

OXFORDSHIRE COUNTY COUNCIL

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Introduction

Effective governance provides strategic direction and control to schools, academies and multi-academy trusts (MATs). It creates robust accountability, oversight and assurance for their educational and financial performance and is ambitious for all children and young people to achieve the very best outcomes.

In the [Governance Handbook](), Effective Governance is described as:
  • 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
  • Overseeing the financial performance of the organisation and making sure its money is well spent

It is based on six key features, grouped under three headings:
  Board's Purpose and Role
  1. *Strategic leadership* that sets and champions vision, ethos and strategy
  2. *Accountability* that drives up educational standards and financial performance
  Organisation of the board
  3. *People* with the right skills, experience, qualities and capacity
  4. *Structures* that reinforce clearly defined roles and responsibilities
  Quality of Governance
  5. *Compliance* with statutory and contractual requirements
  6. *Evaluation* to monitor and improve the quality and impact of governance

What is the Annual Schedule?

The schedule gives an overview of governing board responsibilities and helps plan the year's work. Some activities need to be completed by a specific date and suggestions have been made. **Items in bold font are a statutory requirement.** Notes and links to relevant publications are listed next to each item. These may be DfE guidance (both statutory and non-statutory), links to Oxfordshire County Council information or to resources produced by Oxfordshire Governor Services to support your work.

The main focus of the work of the governing board is to secure **school improvement** and to ensure **statutory compliance** so children benefit. Governors must create robust accountability for executive leaders and be well equipped to ask the right questions.

Governors need to:
  • have a clear understanding of the strengths and weaknesses of the school
  • be influential in determining priorities for school improvement
  • have a clear role in monitoring progress and evaluating impact

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How should we use the Annual Schedule?

Use the schedule to help plan the work of the governing board each term. The focus of the board's work tends to change throughout the year and the sections have been arranged to highlight that changing focus.

* Maintained Schools: governing boards of maintained schools may delegate some of their decision-making powers either to committees or individuals.
*Academies: governors of academies should refer to their Articles of Association and Schemes of Delegation when deciding which of the items listed in this schedule relate to their work; items specific to academies are included and have been identified.

Reporting from the tasks listed should feed into meetings of the governing board. The minutes of governing board meetings are the evidence that the work has taken place. Ensure that all statutory requirements **(in bold)** are included as agenda items at full governing board meetings.

Consider using the template to tailor the schedule: for example, add details of governor monitoring visits each term, linking these to the School Improvement (Development) Plan.

Useful Links:

The **DfE** produces three key governance guidance documents that apply to all schools. Included in them are links to more detailed information and guidance, both statutory and non-statutory. They are:
- Governance Handbook
- A Competency Framework for Governance
- Clerking Competency Framework

There are many other useful documents on the DfE website including:
Local authority maintained schools: governance - GOV.UK (www.gov.uk)
Academy trusts: governance - GOV.UK (www.gov.uk)

The Oxfordshire Governor Services website also contains documents useful to governance, along with templates and procedures that can be used in conjunction with this annual schedule. For those who subscribe to GovernorHub, these resources are also available on the website.

If you have any queries about the Annual Schedule, please contact Oxfordshire Governor Services on 0330 0249046 or email governorservices@oxfordshire.gov.uk.

AUTUMN TERM 2022

Key Priorities for the Autumn term:
Structure: Clarify vision, strategic direction, risks and priorities. Review of structure of the board (committees, delegation of duties etc.) People: Election and appointment of governors to roles/committees Accountability: Collect baseline data

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1	**Organisation of the Board:** **Structures and People**			
A1.1	**Elect Chair and Vice Chair and agree the length of their term of office.**	Only if their term of office has ended. Elections can be held in the summer term	School governance regulations 2013 - GOV.UK (www.gov.uk) (regulation 7, 8 and 9) A competency framework for governance (publishing.service.gov.uk)	
A1.2	**Review the range of committees in place. Agree which committees will be used and then agree their Terms of Reference.**		The_Constitution_of_Governing_Bodies_of_Maintained_Schools_Stat_Guidance school governance regulations 2013 Model Standing orders (OCC template)	
A1.3	**Appoint Committee Members**	Must be done by the full governing board		
A1.4	**Appoint Chairs of Committees**	This task can be delegated to each committee by the full governing board		
A1.5	**Update the register of business (pecuniary and other) interests**	Forms and guidance can be found on the Insite schools website Governing Board Work | Schools (oxfordshire.gov.uk) Governors with access to GovernorHub can also record their interests on their profile page	Financial manual of guidance for schools | Schools (oxfordshire.gov.uk)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1.6	Agree **clerking arrangements for full governing board (FGB)** and committees	In a maintained school, the clerk must not be a governor or the headteacher (although a governor can act as clerk if the clerk fails to attend). In an academy trust, the clerk must not be an academy trustee, the chief executive of the academy trust or a principal of one of the trust's academies.	School governance regulations 2013 - GOV.UK (www.gov.uk) (regulation 11) Clerking Competency Framework	
A1.7	**Appoint Link Governors to specific roles as required: Child protection (safeguarding)**; Whistleblowing; Health & Safety; **SEND**; Pupil Premium; governor training	Ensure expectations are clarified		
A1.8	**Agree if any tasks will be delegated to individuals, committees or the headteacher**	Use a delegation planner (maintained schools) or your **scheme of delegation** (academies)		
A1.9	Appoint governors to monitoring roles	Either identified in the governor monitoring plan or linked to the School Improvement (Development) Plan (**SIP/SDP**)		
A1.10	Agree the schedule for the update of statutory policies; **agree any delegation of this responsibility**	Refer to the gov.uk statutory policies document for permitted delegation Governing Board Work - example policy tracker	statutory policies for schools	
A1.11	**Publish details of governing structures and people on the school's website**, including: • A list of governing board members, associate members and their responsibilities, to include current governors and all governors from the past 12 months • A list of all agreed committees (if used) and their membership	See links for full details of statutory requirements. Governors are not responsible for doing the updates but should monitor the accuracy of website information regularly to ensure that statutory requirements are being met.	What maintained schools must publish online What academies free schools and colleges should publish online	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
	• Governors' attendance record at governing board and committee meetings over the last academic year, including those governors who left within the last 12 months • The register of business (pecuniary and other) interests	A full website check proforma can be found here: Governing Board Work | Schools (oxfordshire.gov.uk)		
A1.12	**Ensure details held about people involved in governance are provided to the Secretary of State via GIAS (Get Information About Schools)**	The update is usually done by school staff members, but governors are responsible for ensuring it is done. If you use GovernorHub, a report can be downloaded to support this statutory duty	Get information about schools .	
A1.13	Maintained schools: Update GovernorHub with the following details: • Chair and Vice Chair • Clerk • Committee membership and chairs • Link governors (in particular safeguarding and finance) • Check all governor details are accurate and up to date • Business interests • Confirm all governors have read Keeping Children Safe in Education 2022 (on their personal profile)	It is a **statutory requirement** for Local Authorities to hold the data requested. We ask that this information is held on GovernorHub and kept up to date throughout the year	GovernorHub	
A1.14	Review and adopt the Governors' Code of Conduct	The Governance Handbook advises boards to adopt and adapt NGA code of conduct (free to access whether a member or not)	Model code of conduct - National Governance Association (nga.org.uk)	
A1.15	Link planned training and recruitment of governors to needs and gaps identified in the skills audit		A competency framework for governance	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
			Training and development	Schools (oxfordshire.gov.uk)	
A1.16	Review subscription to Governor Services / other support – ensure all board members, headteacher and clerk are aware of training / online training / toolkit / helpdesk available/ Insite: Schools News	Oxfordshire Governor Services contact details Email: governorservices@oxfordshire.gov.uk Tel: 0330 0249046	Oxfordshire resources: Oxfordshire Governor Services	Schools Training and development	Schools (oxfordshire.gov.uk)	
A2	**Board's Purpose and Role:** **Strategic Leadership and Accountability**			
A2.1	Agree the current school self-evaluation form (SEF)		Governance handbook and competency framework - GOV.UK (www.gov.uk)	
A2.2	Agree the School Improvement/Development Plan (SIP/SDP)	Ensure it is linked to the budget		
A2.3	Map out, and agree, the governor monitoring plan	The plan should be linked to the success criteria of the agreed School Improvement/Development Plan		
A2.4	Agree content and format of headteacher's report	Ensure the headteacher's report includes data on exclusions and attendance	Understanding your data: a guide for school governors and academy trustees - GOV.UK (www.gov.uk)	
A2.5	Plan for collecting staff, family and pupils' voices and opinions throughout the year			
A2.6	Plan communications to the community			
A2.7	**If the school is an admissions authority (academies, foundation and voluntary aided schools) draw up the admissions policy for the next academic year.**	**This should be consulted on if changes are proposed; if no changes are proposed, this should be consulted on every seven years.**	School admissions code - GOV.UK (www.gov.uk)	
A2.8	Nurseries: Annual review of nursery Published Admission Number (PAN) for the next Academic Year		Nursery admissions policies	Schools (oxfordshire.gov.uk)	
A2.9	Receive and scrutinise the headteacher's report	Headteachers must report to governors regularly	Understanding your data: a guide for school governors and academy trustees - GOV.UK (www.gov.uk)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A2.10	Review Ofsted, Fischer Family Trust data (if the school subscribes to FFT) and Analyse School Performance Data and Inspection Data Summary Report sources	Consider implications for the school		
A2.11	Review pupil progress and attainment, including for identified groups.	Is the school improvement plan having an impact?	Understanding your data: a guide for school governors and academy trustees - GOV.UK (www.gov.uk)	
A2.12	Review external exam results	Consider the impact and learning of the COVID-19 exam arrangements for 2022		
A2.13	Look at impact of additional grants/funding on identified pupils (pupil premium, Covid recovery, P.E and sports, special educational needs and disabilities (SEND) funding etc.	Is it having the expected impact?		
A2.14	Review the quality of education through triangulation of the headteacher assessment, governor visit information, external reports and pupil tracking data		Understanding your data: a guide for school governors and academy trustees - GOV.UK (www.gov.uk)	
A2.15	Review and monitor specified curriculum areas	As agreed in the Governor Monitoring Plan		
A2.16	Receive and discuss report on curriculum developments	Especially in relation to teaching the national curriculum and the quality of education	National curriculum - GOV.UK (www.gov.uk)	
A2.17	**Conduct Headteacher's appraisal (Performance Management Sub-Group)**	Appraisal is recommended for academies. Maintained schools are recommended to undertaker the headteacher's appraisal before that of teachers.	Headteacher appraisals | Schools (oxfordshire.gov.uk)	
A2.18	**Ensure Staff Pay Policy is adopted**		Teacher pay pensions and conditions	
A2.19	**Receive report on teacher appraisal process**		HR policies and guidance | Schools (oxfordshire.gov.uk)	
A2.20	**Ensure the pay committee (or governor panel) has received recommendations from the Headteacher for teacher pay and the appraisal sub-group for headteacher pay**			

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A2.21	**Confirm pay decisions for all teachers by 31 October 2021 and for the headteacher by 31 December 2021**	This is advisable for academies. For maintained schools, the model policy is updated every year during the Autumn term.	HR policies and guidance | Schools (oxfordshire.gov.uk)	
A2.22	Staff wellbeing: consider carrying out a workload survey		School workload reduction toolkit - GOV.UK	
A2.23	Monitor budget	For **maintained schools** this should happen 6 times a year. Period 6 (for September) must be returned to the LA by 17 Oct 2022		
A2.24	Plan a Health & Safety visits by your link governor		Health and safety: advice for schools - GOV.UK (www.gov.uk)	
A2.25	Complete asset management plan		Good estate management for schools - Strategic estate management - Guidance - GOV.UK (www.gov.uk)	
A2.26	Ensure pupil premium eligible pupils are included on the October census to attract funding.	*This is a change from inclusion in the January census*		
A2.27	Review net capacity of the school	How full is your school? What impact does this have on your available budget?	School Organisation and Planning | Schools (oxfordshire.gov.uk)	
A2.28	Review attendance of pupils, including groups		School behaviour and attendance: parental responsibility measures - GOV.UK (www.gov.uk)	
A3	**Quality of Governance:** **Compliance and Evaluation**			
A3.1	**Ensure all required information is published on the school website**	Relates to the whole website, not just to governance. Governors are responsible for ensuring it is up to date, not actually updating it. A full website check proforma can be found here:	What maintained schools must publish online what academies free schools and colleges should publish online	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
		Governing Board Work | Schools (oxfordshire.gov.uk)		
A3.2	**Confirm Whistle-blowing procedures are in place**	Update details in the Whistle-blowing policy and confirm staff have been informed	HR policies and guidance | Schools (oxfordshire.gov.uk)	
A3.3	**Ensure all governors have completed a DBS check and section 128 check**	This will usually be organised through the school office. **The DBS must be applied for within 21 days of election or appointment to the board in a maintained school**		
A3.4	**Approve strategy statement on use of Pupil Premium and publish on website**	**You MUST use the DfE template this year. Include evidence used to inform decisions. Covid recovery funding details should now be included in this statement rather than as a separate document**	Pupil premium - GOV.UK Recovery premium funding - GOV.UK	
A3.5	**Complete evaluation of spend on Pupil Premium and Service Pupil Premium pupils in previous academic year and publish on website**		Pupil premium information for schools and alternative provision settings service pupil premium what you need to know Education Endowment Foundation.org.uk Pupil Premium Guidance	
A3.6	Review DfE Publications to ensure all governors and clerks are aware of current guidance		Local authority maintained schools: governance - GOV.UK Academy trusts: governance - GOV.UK	
A3.7	Ensure governing board is GDPR compliant. Put monitoring in place to ensure GDPR compliance of school		Data protection: toolkit for schools - GOV.UK	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A3.8	**Review and agree the annual safeguarding report and submit online to the LA before the deadline of 16.12.2021**	This will be available from early in the Autumn term and can be completed any time before the deadline as it relates to the previous year	Safeguarding	Schools (oxfordshire.gov.uk)	
A3.9	**Ensure governors have read the latest version of Keeping Children Safe in Education: *KCSiE (2022).***	This was released on 31st May 2022 and will come into force from 1st Sept 2022. Each governor (maintained schools) should confirm compliance on their GovernorHub profile	Keeping children safe in education - GOV.UK	
A3.10	**Ensure all governors have completed Level 2 Safeguarding training**	There is a new statutory requirement from September 2022 that all governors complete safeguarding training as part of their induction. This training should be updated regularly. Governor Services **Safeguarding Children** training fulfils this requirement.	As A3.9	
A3.11	Review School Safeguarding audit form (Section 175 return) and the associated action plan.	Note required actions and monitor termly	Safeguarding	Schools (oxfordshire.gov.uk)	
A3.12	Monitor safeguarding in school by visiting during the school day: talk to staff and children / monitor policies in practice			
A3.13	**Ensure all staff safeguarding training is in place**	Note any gaps and follow up		
A3.14	**Review and monitor compliance with new school uniform statutory guidance**	Schools should be mostly compliant with the statutory guidance by September 2022, with full compliance expected by Summer 2023	Cost of school uniforms - GOV.UK	
A3.15	**Monitor the school's preparedness for compliance with attendance statutory guidance**	From September 2022 schools will be expected to follow the guidance and implement the strategies it contains, with full compliance expected by September 2023	Working together to improve school attendance - GOV.UK	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A3.16	Review and evaluate monitoring from any planned governor visits			
A3.17	Review Skills Audit to ensure governing board has correct skills mix for year ahead	The NGA skills audit is recommended in the Governance Handbook and is free to use whether a member or not.	[Skills audit and skills dashboard - National Governance Association (nga.org.uk)](#)	
A3.18	Consider creating a Governance action plan to support the development of robust governance			
A3.19	Consider making links with other governing boards to offer peer review			

SPRING TERM 2023

Key priorities for the Spring Term:
Strategic Leadership: Drafting and approving the budget for the new academic year for maintained schools (approval deadline at the start of the summer term)   Collaborative working – who are we working with to enhance professionalism of staff or quality of education? (e.g. working with the LA or trust) Accountability: Receiving reports on data, benchmarking, comparison with previous years, budget monitoring, performance management, external accountability e.g. diocesan visits or School Improvement visits Compliance: Monitoring of H&S, employment law, safeguarding, SEND, inclusion, equality & diversity, whistleblowing (competency framework)

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr1	**Board's Purpose and Role:** **Strategic Leadership and Accountability**			
Spr1.1	Draft and approve budget for the coming year (maintained schools).	Submission dates are **Friday** for maintained primary and secondary schools and **Friday 12 May 2022** for maintained special schools	Budget and financial planning | Schools (oxfordshire.gov.uk)	
Spr1.2	To inform planning of the new budget: • Review benchmarking information • Review and agree insurance arrangements • Review staff structure		Schools Financial Benchmarking - GOV.UK	
Spr1.3	**Complete and agree the Schools Financial Values Standard**	Chair to approve online by deadline **31 January 2023** after discussion with the FGB	Schools Financial Value Standard (SFVS) | Schools (oxfordshire.gov.uk) Schools financial value standard (SFVS) and assurance statement - GOV.UK	
Spr1.4	Monitor budget	For maintained schools Period 9 (for December 2022) will be returned to the LA	Budget monitoring | Schools (oxfordshire.gov.uk)	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
		by **23 Jan 2023** and Period 11 (for February 2023) by **15 March 2023**.		
Spr1.5	Receive and scrutinise the Headteacher's report	The headteacher should formally report to governors on a regular basis		
Spr1.6	Review progress with the School Improvement/ Development Plan (SIP/ SDP)			
Spr1.7	Update the self-evaluation form (SEF)			
Spr1.8	Receive and discuss report on curriculum developments, especially in relation to teaching the national curriculum and the quality of education		National curriculum - GOV.UK	
Spr1.9	Review and evaluate monitoring from any planned governor visits as agreed in the governor monitoring plan			
Spr1.10	Review pupil progress and attainment, including for identified groups			
Spr1.11	Review the quality of education through triangulation of the headteacher assessment, governor visit information, external reports, pupil and parent voice and pupil tracking data			
Spr1.12	Review Charging and Letting Policy	To ensure it complies with safeguarding policy	Safeguarding | Schools (oxfordshire.gov.uk)	
Spr1.13	Continue with agreed community communication plan			
Spr1.14	**Publish proposed admissions arrangements for subsequent academic years** (for schools that are admissions authorities) in good time to ensure a transparent process		School admissions code - GOV.UK	
Spr2	**Organisation of the Board: Structures and People**			
Spr2.1	Review governor terms of office to check if any are ending in the next term	For any LA governor terms ending after Easter, please email Governor Services now	Governor Recruitment | Schools (oxfordshire.gov.uk)	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr2.2	Run parent and staff governor elections the school term before the term of office ends	Parent governor roles cannot be reappointed or rolled over. The process is delegated to the Headteacher by the LA	Governor Recruitment | Schools (oxfordshire.gov.uk)	
Spr2.3	Review the board's succession plan and book training	Refer to skills audit for training gaps and refresher courses	Training and development | Schools (oxfordshire.gov.uk)	
Spr3	**Quality of Governance:** **Compliance and Evaluation**			
Spr3.1	Adopt, agree and ratify any policies as per the schedule		Statutory policies for schools and academy trusts - GOV.UK Example Policy Tracker	
Spr3.2	**Ensure all required information is published on the school website**	Relates to the whole website, not just to governance. Governors are responsible for ensuring it is up to date, not actually updating it. A full website check proforma can be found here: Governing Board Work | Schools (oxfordshire.gov.uk)	What maintained schools must publish online what academies free schools and colleges should publish online	
Spr3.3	Review School Safeguarding audit form (Section 175 return) and associated action plan.	Note required actions and monitor termly	Safeguarding | Schools (oxfordshire.gov.uk)	
Spr3.4	Monitor safeguarding in school by visiting in school day: talk to staff and children / monitor policies in practice			
Spr3.5	Consider requesting an Education Safeguarding Advisory Team (ESAT) safeguarding review	This is free for maintained schools; academies can also book this service for a fee	Safeguarding | Schools (oxfordshire.gov.uk)	
Spr3.6	Ensure that any new governors have booked an induction course and completed **safeguarding training**	New requirement from Sept 2022 for all governors to undertake safeguarding training as part of their induction. This should be regularly updated	Training and development | Schools (oxfordshire.gov.uk)	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr3.7	Review effectiveness of Pupil Premium funding, SEND funding and Recovery funding	Recovery funding has replaced Covid catch up funding	Pupil premium - GOV.UK recovery premium funding	
Spr3.8	Review impact of PE and Sports Premium funding		PE and sport premium for primary schools - GOV.UK	
Spr3.9	Review attendance of pupils, including groups (such as children with special educational needs and disabilities; children qualifying for pupil premium funding; year groups etc.)	From September 2022 schools will be expected to follow the new guidance and implement the strategies it contains, with full compliance expected by September 2023	Working together to improve school attendance - GOV.UK	
Spr3.10	Consider commissioning an External Governance Review	To find out about commissioning an external review of governance contact governorservices@oxfordshire.gov.uk	External reviews of governance: guide for schools and academy trusts - GOV.UK	
Spr3.11	Consider best practice sharing and collaboration with other governing boards		Partnership, Federation and Collaboration | Schools (oxfordshire.gov.uk)	

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SUMMER TERM 2023

Key Priorities for the Summer Term:
Accountability: Review progress on the SIP/SDP
Compliance: Approve SEND Information Report and public sector equality statements
Evaluation: Evaluate the impact of the board over the academic year and plan for the next year

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1	**Board's Purpose and Role:** **Strategic Leadership and Accountability**			
Sum1.1	**Approve budget for new financial year (maintained schools) if not already done in Spring term**	Deadline for approval of budget online by chairs of governors is provisionally set as **5th May 2023** for maintained primary and secondary schools. The deadline for maintained special schools is provisionally set as **12th May 2023**	Budget and financial planning | Schools (oxfordshire.gov.uk)	
Sum1.2	Review progress of the School Improvement/ Development Plan			
Sum1.3	Update the self-evaluation form (SEF)			
Sum1.4	**Review child protection policy and procedures**	Have they been effective? Are there any issues or concerns from school or the board? Are there any actions needed?	keeping children safe in education	
Sum1.5	Review the behaviour principles written statement. Are the board's principles reflected in the school behaviour policy?		behaviour and discipline in schools guidance for governing bodies	

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1.6	Review attendance of pupils, including groups	Note new statutory requirements to be in place by September 2023	Working together to improve school attendance - GOV.UK	
Sum1.7	Review pupil exclusions for the year, considering inclusion and equality		School suspensions and permanent exclusions - GOV.UK	
Sum1.8	Receive report on progress in implementing the accessibility plan		Equality Act 2010: advice for schools - GOV.UK	
Sum1.9	Agree purchase of external services			
Sum1.10	Review Appraisal Policy			
Sum1.11	Ensure staff job descriptions have been reviewed			
Sum1.12	Receive Headteacher's report on performance management			
Sum1.13	Review staff attendance			
Sum1.14	Review pay policy ASAP after publication of pay and conditions document in time to inform pay decisions in the autumn term	The OCC model policy for maintained schools is available in the Autumn term	School teachers' pay and conditions - GOV.UK	
Sum1.15	Agree a programme of governing board meetings for the next academic year, including committee meetings	**Governing boards must meet at least three times each academic year**		
Sum1.16	Receive and scrutinise the headteacher's report			
Sum1.17	Monitor budget.	For maintained schools Period 3 (for June) will be returned to the LA before **17th July 2023**	Budget monitoring | Schools (oxfordshire.gov.uk)	
Sum1.18	Audit voluntary funds / school private funds (SFVS question 28)		Schools financial value standard (SFVS) and assurance statement - GOV.UK	
Sum1.19	Review and evaluate monitoring from any planned governor visits			
Sum1.20	Draft budget for new school year (academies)			

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1.21	Review pupil progress and attainment, including discussions around inclusion and equality		[Understanding your data: a guide for school governors and academy trustees - GOV.UK](#)	
Sum1.22	Review and monitor curriculum related areas as agreed in the Governor monitoring plan			
Sum1.23	Review the quality of education through triangulation of headteacher assessment, governor visit information, external reports and pupil tracking data			
Sum1.24	Receive and scrutinise the Headteacher's report			
Sum2	**Quality of Governance:** **Compliance and Evaluation**			
Sum2.1	Adopt, agree and ratify any policies as per the schedule		[Statutory policies for schools and academy trusts - GOV.UK](#) [Example Policy Tracker](#) (OCC GS document)	
Sum2.2	**Publish details of how you spend your PE and sport premium funding by the end of the summer term or by 31 July at the latest**		[PE and sport premium for primary schools - GOV.UK](#)	
Sum2.3	**Approve the SEND Information Report and publish on the website** Review and recommend to the board the school SEND Information Report if a delegated responsibility		[Policy, guidance and resources	Schools (oxfordshire.gov.uk)](#)	
Sum2.4	**Approve the annual school public sector equality duty statement and publish on the website**		[Public sector equality duty - GOV.UK (www.gov.uk)](#)	
Sum2.5	Receive the annual report from the Designated teacher for looked-after children (*Children We Care For*).		[Designated teacher for looked-after and previously looked-after children - GOV.UK](#)	
Sum2.6	**Ensure all required information is published on the school website**	Relates to the whole website, not just to governance. Governors are	[What maintained schools must publish online](#)	

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
		responsible for ensuring it is up to date, not actually updating it. A full website check proforma can be found here: Governing Board Work | Schools (oxfordshire.gov.uk)	what academies free schools and colleges should publish online	
Sum2.7	**Ensure all staff safeguarding training is in place; note any gaps and follow up**		Keeping children safe in education - GOV.UK	
Sum2.8	Consider and review progress towards the school's agreed equality objectives. **These should be updated every four years**		Equality Act 2010: advice for schools - GOV.UK	
Sum2.9	Review effectiveness of Pupil Premium, SEND and any other funding		pupil premium effective use and accountability	
Sum2.10	Evaluate the impact of the board over the last academic year		NGA skills audit: Governing board self-review | Skills audit and skills matrix - National Governance Association (nga.org.uk)	
Sum2.11	Conduct self-review of the governing board's effectiveness – consider an external governance review		Governing board self-review | Twenty questions for governing board self-review - National Governance Association (nga.org.uk)	
Sum2.12	Evaluate the current Governance action plan, focusing on impact		External reviews of governance: guide for schools and academy trusts - GOV.UK	
Sum3	**Organisation of the Board: Structures and People**			
Sum3.1	Review the governing board succession plan and governing board training needs	Refer to GovernorHub (www.governorhub.com) or Training and development | Schools	Training and development | Schools (oxfordshire.gov.uk)	

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
		(oxfordshire.gov.uk) for current training programme		
Sum3.2	Consider holding chair and vice chair elections in preparation for the new academic year			
Sum3.3	Appoint governors to conduct headteacher's appraisal in the autumn; ensure they are, or will be trained; appoint your External Adviser	Maintained schools MUST have an external adviser for headteacher appraisal; this is recommended for academies.	Headteacher appraisals	Schools (oxfordshire.gov.uk)	
Sum3.4	Review governor vacancy levels and note end of terms of office to plan recruitment for the next academic year		Governor Recruitment	Schools (oxfordshire.gov.uk)	
Sum3.5	Review the school's Instrument of Government	To ensure it still meets the needs of the school	How to change your instrument of government (reconstitute) OCC procedures	

Key Dates throughout the academic year

Autumn Term	
September	
Ensure child protection and safeguarding policy is agreed and that board members have read and understood KCSIE for the current academic year.	Local Authority Designated Officer (LADO) | Schools (oxfordshire.gov.uk) Keeping children safe in education - GOV.UK
Reception baseline assessment for each child should be completed in the first 6 weeks after they enter reception	Primary assessments: future dates - GOV.UK (www.gov.uk)
30 September – Headteachers who wish to leave at the end of the autumn term must have handed in their resignation by this date.	Headteacher recruitment | Schools (oxfordshire.gov.uk)
Restructure programme for maintained schools (working with Education Personnel Services (EPS) guidance) started now would be implemented by the summer term 2023	http://schools.oxfordshire.gov.uk/cms/content/schools-hr
Start of new financial year for academies	Academy Trust Handbook - Guidance - GOV.UK (www.gov.uk)
October	
Confirm pay decisions for all teachers by 31 October	
Budget monitoring report submitted to LA for period 6 (Sept) by 17 October 2022	
31 October - Deputy headteachers and teachers who wish to leave at the end of the autumn term must have handed in their resignation by this date.	
Admission policy consultation (for academy, foundation and voluntary aided schools) to last at least six weeks and to take place between **01 October** and 31 January in the academic year before the policy will be used	School admissions code - GOV.UK (www.gov.uk)
Admissions applications to secondary schools close on **31 October**	
November	
Admissions applications to studio schools and UTCs close on **30 November**	
December	
16 December – statutory requirement to submit safeguarding report to LA after review and agreement by the FGB	Safeguarding | Schools (oxfordshire.gov.uk)

Headteacher appraisal must be completed and a pay decision made by **31 December 2022** for maintained schools	[Headteacher appraisals | Schools (oxfordshire.gov.uk)](#)

Spring Term	
January	
Schools Financial Value Standard (maintained schools) returned to the Local Authority by 31 January 2023	
Budget monitoring report submitted to LA for period 9 (Dec) by **23rd January 2023**	
31 January - Headteachers who wish to leave at the end of the spring term must have handed in their resignation by this date	
Restructure programme for maintained schools (working with EPS) started January 2023 would be implemented by the autumn term 2023	
Admissions applications to primary schools close **15 January**	
February	
28 February - Deputy headteachers and teachers who wish to leave at the end of the spring term must have handed in their resignation by this date.	
Local Authorities confirm budgets for maintained schools	
The Education and Skills Funding Agency (EFSA) confirms academy budgets	
March	
Budget monitoring report submitted to LA for period 11 (Feb) by **15th March 2022**	
National offer day for secondary school places is **1st March**	
April	
National offer day for places at primary schools is **17 April 2023**	
Headteachers who wish to leave at the end of the summer term must have handed in their resignation by **30th April**	
Summer Term	
May	
The deadline for all maintained primary, including nursery schools and secondary schools to submit their governor approved budget to the Local Authority covering the period 2023-24 to 2025-26 is Friday 5th May 2023	

For maintained special schools the date is Friday 12 May 2023	
31st May is the last date for announcing any proposed redundancies to take place from September	
Deputy Headteacher/Teachers who wish to leave at the end of the summer term must resign by **31st May**	
Key stage 1 test period	
The key stage 2 tests are timetabled from **Monday 8 May** to **Thursday 11 May 2023.**	https://www.gov.uk/guidance/key-stage-1-and-key-stage-2-test-dates https://www.gov.uk/topic/schools-colleges-childrens-services/exams-testing-assessment/latest
GCSE and A level exams throughout May and June	
June	
Schools should administer the multiplication tables check within the 3-week period from **Monday 5 June 2023**.	Multiplication tables check administration guidance - GOV.UK (www.gov.uk)
Week commencing **Monday 12 June 2023** Phonics screening check week	Key stage 1: phonics screening check administration guidance - GOV.UK (www.gov.uk)
July	
PE and sport premium funding report must be published by the end of the summer term or by 31 July at the latest	
SATs results reported to schools, including phonics test results	
August	
GCSE and A Level results published	