Governor Services

For all those involved in school governance in Oxfordshire

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

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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 or linked to our local policy requirements.** 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

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. If it didn't happen in a minuted board meeting, it didn't happen.** 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.

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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.

Our fortnightly Governor Services Newsletter will keep you up to date during the academic year with any changes to legislation or guidance. It is sent to all those on GovernorHub and is posted to the Oxfordshire Governor Services website. If you subscribe to GovernorHub through the buyback but don't receive it, please do get in touch.

> **December 2023 update:**
>
> All links updated to ensure they work with the new Schools website
>
> Deadline for SFVS submission added

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Governor Services

OXFORDSHIRE COUNTY COUNCIL

AUTUMN TERM 2023

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. Some boards prefer to hold elections in the summer term, so they are more prepared in September	School governance regulations 2013 - GOV.UK (www.gov.uk) (regulation 7, 8 and 9) A competency framework for governance (publishing.service.gov.uk) Governing board work	Oxfordshire Schools (Chair election suggested procedures)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1.2	**Review the range of committees in place. Agree which committees will be used and then agree their Terms of Reference.**	**Maintained schools in Oxfordshire will need to have pay committee in line with the OCC pay policy.**	**Constitution of Governing Bodies of Maintained Schools Stat Guidance (gov.uk)** **school governance regulations 2013** **Model Standing orders (OCC template)**	
A1.3	**Appoint Committee Members**	**Must** be done by the full governing board in an FGB meeting		
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. The summary of interests for the full board can be printed as a GovernorHub report	**Financial manual of guidance for schools	Schools (oxfordshire.gov.uk)**	
A1.6	Agree **clerking arrangements for full governing board (FGB)** and committees	In a maintained school, the clerk must not be a governor. A governor can act as clerk if the clerk fails to attend but this must not be the headteacher. In an academy trust, the clerk must not be an academy trustee, the chief executive of	**School governance regulations 2013 - GOV.UK (www.gov.uk) (regulation 11)** **Clerking Competency Framework**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
		the academy trust or a principal of one of the trust's academies		
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	**Filtering and Monitoring – Link governor** Governing bodies and proprietors have overall strategic responsibility for filtering and monitoring and need assurance that the standards are being met. To do this, they should identify and assign: • a member of the senior leadership team and a governor, to be responsible for ensuring these standards are met	NEW FOR THIS ACADEMIC YEAR	**Meeting digital and technology standards in schools and colleges - Filtering and monitoring standards for schools and colleges - Guidance - GOV.UK (www.gov.uk)**	
A1.9	Appoint a link governor for Attendance	New recommendation for this year. Guidance is statutory from Sept 2023	**Working together to improve school attendance (publishing.service.gov.uk)**	
A1.10	**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)		
A1.11	Appoint governors to monitoring roles	Either identified in the governor monitoring plan, school evaluation form (SEF) or linked to the School Improvement (Development) Plan (**SIP/SDP**)		
A1.12	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	**Statutory policies for schools and academy trusts - GOV.UK (www.gov.uk)**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
			Governing Board Work - example policy tracker	
A1.13	**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 • 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	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** A full website check proforma can be found here: **Governing board work	Oxfordshire Schools**	
A1.14	**School website: Diversity Data** Schools are encouraged to collect and publish governing board members' diversity data. Information should be widely accessible to members of the school community and the public. Board members can opt out of sharing their information, including protected characteristics, at any given time including after publication. Schools must ensure that individuals cannot be identified through the publication of data, particularly when board member levels are low	NEW STATUTORY REQUIREMENT		

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1.15	**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**	
A1.16	Maintained schools: Update GovernorHub with the following details: • Chair and Vice Chair • Clerk • Committee membership and chairs • Link governors (in particular safeguarding, SEND and finance) • Check all governor details are accurate and up to date • Business interests • Confirm all governors have read Keeping Children Safe in Education 2023 (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 If you need support to work out how to do this please email governorservices@oxfordshire.gov.uk and we can talk you through it or even arrange training for your board	**GovernorHub**	
A1.17	Review and adopt the Governors' Code of Conduct and agree adherence to the Nolan principles of public life	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)** **The Seven Principles of Public Life - GOV.UK (www.gov.uk)**	

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A1.18	All governors to sign up to the agreed code of conduct and Nolan Principles. This should be confirmed on their individual profile on GovernorHub.			
A1.19	Review governor terms of office to check if any are ending in the next term Run parent and staff governor elections if there are vacancies	For any LA governor terms ending after Christmas, please email Governor Services now	**Governor recruitment	Oxfordshire Schools**	
A1.20	Link planned training and recruitment of governors to needs and gaps identified in the skills audit		**A competency framework for governance** **Governor Skills Audit	National Governance Association (nga.org.uk)** **Governor training and development	Oxfordshire Schools**	
A1.21	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: Governor Services	Oxfordshire Schools Governor training and development	Oxfordshire Schools**	
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)**	

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OXFORDSHIRE COUNTY COUNCIL

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
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		**Early Years and Childcare Sufficiency and Access	Oxfordshire Schools**	
A2.9	Receive and scrutinise the headteacher's report	Headteachers must report regularly to governors	**Understanding your data: a guide for school governors and academy trustees - GOV.UK (www.gov.uk)**	
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		

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A2.11	*Review pupil progress and attainment, including for identified groups.*	*Is the school improvement plan having the intended impact?*	**Understanding your data: a guide for school governors and academy trustees - GOV.UK (www.gov.uk)**	
A2.12	Review external exam results			
A2.13	*Look at impact of additional grants/funding on identified pupils (pupil premium, Service 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 reports 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 (Appraisal 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**		**Schools HR	Oxfordshire Schools**	
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**			
A2.21	**Confirm pay decisions for all teachers by 31 October 2023 and for the headteacher by 31 December 2023**	This is advisable for academies.	**HR policies - P	Oxfordshire Schools**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
		For maintained schools, the model policy is updated every year during the Autumn term.		
A2.22	Staff wellbeing: consider carrying out a workload survey		School workload reduction toolkit - GOV.UK	
A2.23	Monitor the budget	For maintained schools this should happen 6 times a year. Period 6 (for September) must be returned to the LA by **16 Oct 2023**	Budget monitoring | Oxfordshire Schools	
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.		Pupil premium 2023-24: conditions of grant for local authorities - GOV.UK (www.gov.uk)	
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 | Oxfordshire Schools	
A2.28	**Review attendance of pupils, including groups**	Compliance with legislation is now a statutory requirement	School behaviour and attendance: parental responsibility measures - GOV.UK (www.gov.uk) Working together to improve school attendance - GOV.UK (www.gov.uk)	

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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: **Governing Board Work | Schools (oxfordshire.gov.uk)**	**What maintained schools must publish online** **what academies free schools and colleges should publish online**	
A3.2	**Confirm Whistle-blowing procedures are in place**	Update details in the Whistle-blowing policy and confirm staff have been informed	**HR policies - W | Oxfordshire Schools**	
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**	**Keeping children safe in education - GOV.UK (www.gov.uk)**	
A3.4	**Approve strategy statement on use of Pupil Premium and publish on website**	**You MUST use the DfE template. 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**	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
			Education Endowment Foundation.org.uk Pupil Premium Guidance	
A3.6	Review DfE Publications to ensure all governors and clerks are aware of current guidance	Updates are shared with governors in the Governor Services fortnightly newsletter which is emailed to all GovernorHub subscribers and is also available on the Insite Schools website If you are not receiving the update, please contact Governor Services	**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**	
A3.8	**Review and agree the annual safeguarding report and submit online to the LA before the deadline of 20th December 2023**	This will be available from 24th July 2023 and can be completed any time from 1st September 2023. Must be approved at an FGB meeting	**Safeguarding	Oxfordshire Schools**	
A3.9	**Ensure governors have read the latest version of Keeping Children Safe in Education: *KCSiE (2023).***	This was released on 6th June 2023 and will come into force from **1st Sept 2023**. Each governor (maintained schools) should confirm compliance on their GovernorHub profile	**Keeping children safe in education - GOV.UK**	

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A3.10	**Ensure all governors have completed Level 2 Safeguarding training** and record training record on GovernorHub	Statutory requirement from September 2022. Best practice is that all governors **must** complete level 2 safeguarding training as part of their induction. This training should be updated every 3 years. Governor Services **Safeguarding Children Level 2** training fulfils this requirement	**Safeguarding | Oxfordshire Schools**	
A3.11	**Ensure all governors have completed Prevent Duty Course 1 (Awareness)** and record on GovernorHub training records	Standard free government course. Should be completed every time it is revised and as often as the board determines.	**Prevent duty training: Learn how to support people vulnerable to radicalisation | Prevent duty training (support-people-vulnerable-to-radicalisation.service.gov.uk)**	
A3.12	Review School Safeguarding audit form (Section 175 return) and the associated action plan.	Note required actions and monitor termly	**Safeguarding | Oxfordshire Schools**	
A3.13	Monitor safeguarding in school by visiting during the school day: talk to staff and children / monitor policies in practice			
A3.14	**Ensure all staff safeguarding training is in place**	Note any gaps and follow up		
A3.15	**Review and monitor compliance with new cost of school uniform statutory guidance**	**Schools now should be fully compliant with the statutory guidance.** **Note new Equality and Human Rights guidance on preventing hair discriminations**	**Cost of school uniforms - GOV.UK** **Preventing hair discrimination in schools | Equality and Human Rights Commission (equalityhumanrights.com)**	
A3.16	**Check that the school is now compliant with attendance statutory guidance**	**Full compliance expected by September 2023**	**Working together to improve school attendance - GOV.UK**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A3.17	Review and evaluate monitoring from any planned governor visits			
A3.18	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)	
A3.19	Consider creating a Governance action plan to support the development of robust governance			
A3.20	Consider making links with other governing boards to offer peer review			

SPRING TERM 2024

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)

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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).	This should be done in committee meetings and approved by the full governing board *before* the Chair completes the online sign off. NOTE - We have not yet been given submission dates for this academic year, but they are usually the **first Friday in May** for maintained primary and secondary schools and **the second Friday in May** for maintained special schools	**Budgets | Oxfordshire Schools**	
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 the deadline, after discussion with the FGB. Deadline has not yet been confirmed by Finance, but is usually around the end of January. As soon as we know, we will share in our newsletter	**Schools Financial Value Standard (SFVS) | Oxfordshire Schools** **Schools financial value standard (SFVS) and assurance statement - GOV.UK**	
Spr1.4	Monitor the current year's budget	For maintained schools Period 9 (for December 2023) will be returned to the LA by Monday 22 January 2024	**Budget monitoring | Oxfordshire Schools**	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
		and Period 11 (for February 2024) by Friday 15 March 2024		
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 reports 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		**School admissions code - GOV.UK**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
	admissions authorities) in good time to ensure a transparent process			
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. Take action to fill current vacancies	For any LA governor terms ending after Easter, please email Governor Services now	**Governor recruitment	Oxfordshire Schools**	
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	Oxfordshire Schools**	
Spr2.3	Review the board's succession plan and book training	Refer to skills audit for training gaps and refresher courses	**Governor training and development	Oxfordshire Schools**	
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**	
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**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr3.3	**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** .	
Spr3.4	Review School Safeguarding audit form (Section 175 return) and associated action plan.	Note required actions and monitor termly	**Safeguarding | Oxfordshire Schools**	
Spr3.5	Monitor safeguarding in school by visiting in school day: talk to staff and children / monitor policies in practice			
Spr3.6	Request an Education Safeguarding Advisory Team (ESAT) safeguarding review	This is free for maintained schools; academies can also book this service for a fee	**Safeguarding | Oxfordshire Schools**	
Spr3.7	Ensure that any new governors have booked an induction course and completed **safeguarding training**	New statutory requirement from Sept 2022 for all governors to undertake safeguarding training as part of their induction. Best practice is to complete the Level 2 safeguarding training (valid for 3 years) and Prevent training	**Governor training | Oxfordshire Schools**	
Spr3.8	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**	
Spr3.9	Review impact of PE and Sports Premium funding		**PE and sport premium for primary schools - GOV.UK**	
Spr3.10	Review attendance of pupils, including groups (such as children with special educational needs and disabilities;	Full compliance with the statutory guidance is expected from September 2023	**Working together to improve school attendance - GOV.UK**	

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
	children qualifying for pupil premium funding; year groups etc.)			
Spr3.11	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 External review of governance | Oxfordshire Schools	
Spr3.12	Consider best practice sharing and collaboration with other governing boards		Partnership, federation and collaboration | Oxfordshire Schools	

SUMMER TERM 2024

Key Priorities for the Summer Term:

Accountability: Review progress on the SIP/SDP/SEF

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

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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 in full governing board meeting (maintained schools) if not already done in Spring term**	Deadline for approval of budget online by chairs of governors has not yet been confirmed but is usually the end of the first week in May for maintained primary and secondary schools. And the second week in May for maintained special schools	**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**	
Sum1.6	Review attendance of pupils, including groups		**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**	

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OXFORDSHIRE
COUNTY COUNCIL

Annual Schedule of Governing Board Business (updated Dec 2023)   Academic Year 2023-2024

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
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		**HR policies and guidance | Schools (oxfordshire.gov.uk)**	
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 Monday 15 July 2024	**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)			

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](#)	
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			
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)](#)	

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
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 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**	
Sum2.7	**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** .	
Sum2.8	**Ensure all staff safeguarding training is in place; note any gaps and follow up**		**Keeping children safe in education - GOV.UK**	
Sum2.9	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**	
Sum2.10	Review effectiveness of Pupil Premium, SEND and any other funding		**pupil premium effective use and accountability**	

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum2.11	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)**	
Sum2.12	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)** **External reviews of governance: guide for schools and academy trusts - GOV.UK** **External review of governance	Oxfordshire Schools**	
Sum2.13	Evaluate the current Governance action plan, focusing on impact			
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 (oxfordshire.gov.uk)** for current training programme	**Training and development	Schools (oxfordshire.gov.uk)**	
Sum3.2	Consider holding chair and vice chair elections, review of committee structure and membership in the summer	These appointments and elections can be held at any time of the year. Holding them in the summer means being more	**Governing board work	Oxfordshire Schools**	

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
	term (See A1.1-1.4) in preparation for the new academic year	prepared for the start of the autumn term		
Sum3.3	**Appoint two or three 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 | Oxfordshire Schools](#)	
Sum3.4	Review governor vacancies and note end of terms of office to plan recruitment for the next academic year. Where there are currently vacancies, take action to fill them	For any LA governor terms ending after the summer, please email Governor Services now	[Governor recruitment | Oxfordshire Schools](#)	
Sum3.5	Review the school's Instrument of Government	To ensure it still meets the needs of the school	[Governing board work | Oxfordshire Schools](#)	

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. Each member of the board can confirm this on their GovernorHub profile	**Local Authority Designated Officer (LADO) | Schools (oxfordshire.gov.uk)** **Keeping children safe in education - GOV.UK**
Reception baseline assessment for each child must 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 2024	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) (Also known as the Academies Financial Handbook)**
October	
Confirm pay decisions for all teachers by **31 October 2023**	
School census day – **5th October 2023**	
Budget monitoring report submitted to LA for period 6 (September) **Monday 16 October 2023**	
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.	

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Admission policy consultation (for academy, foundation and voluntary aided schools) to last at least six weeks and to take place between 1 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 2023**	
November	
Admissions applications to studio schools and UTCs close on **30 November**	
December	
20 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 2023** for maintained schools	[Headteacher appraisals | Oxfordshire Schools](#)
Spring Term	
January	
Schools Financial Value Standard (maintained schools) returned to the Local Authority by **9th February 2024**	
School census date – **Thursday 18th January 2024** (includes free school meals data for Pupil Premium funding)	
Budget monitoring report submitted to LA for Month 9 (December) **Monday 22 January 2024**	
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 2024**	

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 Month 11 (February) Friday 15 March 2024	
National offer day for secondary school places is **1st March**	
April	
National offer day for places at primary schools is **16 April**	
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 usually the end of the first week in May. For maintained special schools the date is the end of the second week in May. We have not yet been advised of the dates for this academic year. We will update the schedule when we have them	
School census date – **Thursday 16th May 2024**	
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 recommended test period	
The key stage 2 tests are timetabled from **Monday 13 May** to **Thursday 16 May 2024.**	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 must administer the multiplication tables check within the 2-week period from **Monday 3 June 2024**	Multiplication tables check administration guidance - GOV.UK (www.gov.uk)
Week commencing **Monday 10 June 2024** Phonics screening check week	Key stage 1: phonics screening check administration guidance - GOV.UK (www.gov.uk)
July	
Budget monitoring report submitted to LA for Month 3 (June) **Monday 15 July 2024**	
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	

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