



# Trustee Induction Policy

<b>Staff Responsible:</b>	<b>Mrs E Chandler</b>
<b>Date of Issue:</b>	September 2023
<b>Review Date:</b>	September 2026

The Trustees and Headteacher believe it is essential that all new trustees receive a comprehensive induction package covering a broad range of issues and topics. There is a commitment to ensure that the new trustees are given the necessary information and support to fulfil their role with confidence. The process is seen as an investment, leading to more effective governance and retention of trustees (the trustees are the persons who form the Board).

#### **PURPOSE**

- To welcome new trustees to the Board of Trustees and enable them to meet other members.
- To encourage new trustees to visit the school to experience its atmosphere and understand its ethos.
- To meet the Headteacher, staff and children.
- To explain the partnership between the Headteacher, school and Board of Trustees.
- To explain the role and responsibilities of trustees.
- To give background material on the school and current issues.
- To allow new trustees to ask questions about their role and/or the school.
- To explain how the Board and its committee's work.
- To allow new trustees to join the committee(s) most suited to their skill base/interest (identified through initial interview and subsequent skills audit).

#### ***New trustees will:***

- Be welcomed to the Board of Trustees by the Chair.
- Be invited by the Headteacher to visit the school.
- Be given the opportunity to tour the school and meet staff and children.
- Receive an informal briefing on the school from the Headteacher.
- Be given the opportunity to meet informally with an existing trustee who will then act as their mentor.
- Be accompanied by their mentor to their first full Board meeting (if required).
- Be given the opportunity to review their first meeting with the mentor.
- Attend the 'New Governors Induction Programme' (within first 12 months of office).

#### ***New trustees will receive:***

- The school's "Code of conduct for Trustees".
- The school's Articles of Association and Funding Agreement.
- The school's Safeguarding policy.
- The Education Authority's governor training programme.
- Details of the Board of Trustees committees including their terms of reference.
- Dates for future trustee meetings including committees.
- Details of how to contact the other trustees.

- Details of how to contact the school including e-mail address.
- Access to the school's electronic calendar and documents/policies.
- Recent school newsletters.

***New trustees are also recommended to read:***

- The School Improvement Plan.
- The latest Ofsted report and action plan.
- Policy documents relevant to committee membership.
- The monitoring performance and evaluation policy.
- The school visits policy.

***Areas that the Headteacher will cover include:***

- Background to the school.
- Current issues facing the school.
- Arrangements for visiting the school.
- The relationship between the Headteacher and Board of Trustees.

***Areas that the mentor will cover include:***

- An overview of the trustees role.
- How the full Board and committee meetings are conducted.
- How to propose agenda items.
- Trustee training.

In order to be fully prepared for their duties, new Trustees should be supported into their role through a robust, high-quality induction. It is good practice for Trust Boards to have a Trustee induction procedure which provides all the essential information regarding the Trust, its governance arrangements.

The induction checklist should be completed as the induction process progresses and should be adapted according to the knowledge and experience of individual trustees. Before undertaking their duties, new Trustees and the Chair of the Board of Trustees will ensure all areas of the induction process have been covered.

Action	Completed (Trustee please tick and include date of completion)	Completed (Inducting trustee please tick and date when completed)	Comments or further action required
<b>Preparation</b>			
Welcomed to the trust by the Chair of the Board of Trustees.			
Purpose of the induction process explained.			
Overview of the Trust, including its vision, ethos and values explained.			
Overview of the Trust's governance structure.			
Introduction to the Trust's members and their roles explained.			
Introduced to the Trustees and their specific roles.			
Introduced to the Clerk to the Board of Trustees.			
Introduced to roles of executive leaders and their roles.			
Provided information on the protocol for visiting the Academy and meeting Academy leaders and staff.			

Received an informal briefing on the Trust from the Chair to the Board of Trustees, including the current successes and challenges of the Trust.			
Assigned a Trustee Mentor.			
Completed a Declaration of Interest form.			
Completed a connected or party interests declaration.			
Completed their DBS and Section 128 checks.			
Viewed the trust's website and signposted to Academy's website.			
Received the dates of upcoming Trustees' meetings, including Committee meetings.			
Provided access to previous Trust Board and Committee meeting minutes.			
Provided with an explanation of the role of the DfE.			
Provided with an explanation of the role of the National and Regional Schools Commissioners.			
Provided with an explanation of the role and responsibilities of the Head teacher.			
Provided access to any membership services, e.g. Governor Hub			
Provided access to any document storage systems or Trust intranet.			

**Provision of relevant documentation and information**

**Inductee has received a copy of, or has been signposted to, the following resources**

Keeping Children Safe in Education			
Working Together to Safeguard Children			
Mandatory safeguarding training			
Statutory policies the Board of Trustees has responsibility for determining: <ul style="list-style-type: none"> <li>• Child Protection and Safeguarding Policy</li> <li>• Admissions Policy</li> <li>• Charging and Remissions Policy</li> <li>• SEND Policy</li> <li>• Supporting Pupils with Medical Conditions Policy</li> </ul>			
The Trust's Complaints Policy			
The Trust's Data Protection Policy			
The Trust's social media Policy			
The Trust's Academy Visits Policy			
The Trust's Articles of Association			
The 'Academies Financial Handbook'			
The 'Governance Handbook'			
The Trustee role profile and code of conduct			

Details and terms of reference for committees			
Contact details for all Trustees			
Contact details for the Clerk to the Board of Trustees			
Contact details for key members of staff			
A copy of the Trust's scheme of delegation			
Calendar of relevant events			
Details of how to access any relevant Trust or Academy newsletters			
The Academy's latest Ofsted reports			
The latest annual return/confirmation statement			
The latest annual report and copy of filed accounts			
Details of the Trust's current financial position			
Details of any relevant training opportunities			
A copy of the trust's growth and development plan			
The Trustees' Expenses Policy, with the accompanying claim form.			
The '7 Principles of Public Life'			

**Understanding the processes of the governing board**

**The inductee has received information on, or been signposted to, further resources with regard to the following areas**

The current issues of priority for the Trust Board			
Details of the Trust's monitoring processes and procedures			
The language and abbreviations of the education sector			
Preparing for meetings			
Chair's action – when and how it may be used			
The voting process of the Board of Trustees			
The process for Trustees visits to the Academy			
The process for raising concerns and issues			
The role and identity of the Trust safeguarding lead			
The role and identity of any other trust-wide professional leads, e.g. subject leads			
Details of how the Trust manages and minimises risk			
The importance of ethical leadership			