Trustee Induction Policy

Staff Responsible:	**Mrs E Chandler**
Date of Issue:	September 2026
Review Date:	September 2027

Introduction

The Trustees and Headteacher believe it is essential that all new Trustees receive a comprehensive induction programme covering a broad range of governance, compliance and strategic leadership responsibilities. The Trust is committed to ensuring that all new Trustees are provided with the information, training and support necessary to fulfil their role confidently and effectively.

The induction process is seen as an investment in the future effectiveness of the Board of Trustees, supporting strong governance, informed decision-making and the retention of Trustees.

Trustees are expected to act in accordance with the Trust's values, uphold the Nolan Principles of Public Life and fulfil their duties in the best interests of the Trust at all times.

Purpose

The purpose of the Trustee induction process is:

- To welcome new Trustees to the Board of Trustees and enable them to meet other Board members.
- To introduce Trustees to the vision, values, ethos and strategic priorities of the Trust.
- To encourage Trustees to visit the Academy and understand its culture and educational provision.
- To meet senior leaders, staff and gain an understanding of the pupil experience.
- To explain the relationship between the Board of Trustees, Members, Executive Leaders and Academy leaders.
- To explain the legal duties, strategic responsibilities and accountability of Trustees.
- To provide background information on the Trust, its governance arrangements and current priorities.
- To explain how the Board and its committees operate, including decision-making processes.
- To support Trustees in identifying suitable committee membership based on their skills and experience.
- To ensure Trustees understand their safeguarding, compliance, financial and ethical responsibilities.
- To provide opportunities for Trustees to ask questions and seek clarification regarding their role.
- To identify professional development and training needs through a skills audit process.

Trustee Expectations

All Trustees are expected to:

- Act in the best interests of the Trust and its pupils.
- Uphold the Trust's Code of Conduct.
- Maintain confidentiality where appropriate.
- Declare any actual, potential or perceived conflicts of interest.
- Comply with safeguarding requirements.
- Attend meetings regularly and participate fully in governance activities.
- Undertake mandatory and recommended training.

- Adhere to the Seven Principles of Public Life (Nolan Principles).
- Support the Trust's commitment to equality, diversity and inclusion.
- Promote high standards of educational achievement and financial stewardship.

Induction Timescales

The induction process should normally be completed within the first twelve months of appointment.

Within the First Month	Within the First Three Months	Within the First Twelve Months
The Trustee should: • Meet the Chair of Trustees. • Meet the Headteacher and Executive Leaders. • Receive a governance briefing. • Complete all required declarations. • Complete safeguarding training. • Receive induction documentation. • Be assigned a Trustee mentor. • Receive access to governance platforms and document storage systems.	The Trustee should: • Attend a Board meeting. • Attend at least one committee meeting where appropriate. • Undertake a school or Academy visit. • Complete a Trustee skills audit. • Participate in governance training. • Meet with their mentor to review progress.	The Trustee should: • Complete a recognised Trustee induction programme. • Attend relevant governance training. • Review their induction experience with the Chair and mentor. • Agree future development priorities.

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 Academy and meet staff.
- Receive an informal briefing from the Headteacher regarding the school and Trust.
- Be given the opportunity to meet informally with an experienced Trustee who will act as a mentor.
- Be accompanied by their mentor to their first Board meeting if required.
- Have the opportunity to review their first meeting with their mentor.
- Complete a Trustee skills audit.

- Attend induction and governance training during their first year of office.

New Trustees Will Receive

- The Trust's Trustee Code of Conduct.
- The Trust's Articles of Association.
- The Scheme of Delegation.
- The Funding Agreement.
- Board and committee terms of reference.
- Dates for future Trustee and committee meetings.
- Contact details for Trustees and key staff.
- Access to relevant governance platforms and document storage systems.
- Access to Trust calendars and governance documentation.
- Recent newsletters and Trust communications.
- Information regarding training and development opportunities.

New Trustees Are Recommended to Read

- The School Improvement Plan.
- The Trust Strategic Plan.
- The latest Ofsted reports and associated action plans.
- Annual reports and audited accounts.
- Relevant committee policies.
- Monitoring, evaluation and performance policies.
- Academy visit procedures.
- Current Board minutes.
- The Trust growth and development plan.

Areas Covered by the Headteacher

The Headteacher will provide information regarding:

- The history and background of the Academy.
- Vision, ethos and values.
- Current priorities and challenges.
- Educational performance.
- Arrangements for visits.
- Relationships between governance and leadership.
- Safeguarding arrangements.
- Inclusion and SEND provision.

Areas Covered by the Mentor

The mentor will support the Trustee by explaining:

- The role of a Trustee.
- How Board and committee meetings operate.
- Governance protocols and expectations.
- How agenda items are proposed.
- The decision-making process.
- Effective questioning and challenge.
- Training opportunities.
- Key educational terminology and abbreviations.

Safeguarding Requirements

All Trustees must:

- Read the relevant sections of Keeping Children Safe in Education.
- Read Working Together to Safeguard Children.
- Complete safeguarding training on appointment.
- Receive annual safeguarding updates thereafter.
- Understand the role of the Designated Safeguarding Lead.
- Understand the Trust's Child Protection and Safeguarding Policy.
- Understand their safeguarding responsibilities as Trustees.

Equality, Diversity and Inclusion

As part of induction, Trustees will receive information relating to:

- Equality Act duties.
- Public Sector Equality Duty requirements.
- SEND responsibilities.
- Inclusion across the Trust.
- Support for disadvantaged and vulnerable pupils.
- Promoting equality of opportunity.

Data Protection and Cyber Security

Trustees will receive guidance regarding:

- Data protection and GDPR responsibilities.
- Confidentiality requirements.
- Secure handling of information.

- Cyber security awareness.
- Appropriate use of Trust technology.
- Reporting data breaches and cyber incidents.

Responsibilities

Chair of Trustees

Responsible for:

- Welcoming the Trustee.
- Providing governance briefings.
- Ensuring induction is completed.
- Reviewing induction effectiveness.

Headteacher

Responsible for:

- Introducing the Academy.
- Facilitating visits.
- Explaining educational priorities and performance.

Trustee Mentor

Responsible for:

- Ongoing support and guidance.
- Assisting attendance at meetings.
- Reviewing progress.

Clerk to the Board

Responsible for:

- Maintaining induction records.
- Monitoring completion of documentation.
- Recording training undertaken.
- Supporting governance administration.

Monitoring and Evaluation

The Clerk will maintain records of completed induction activities and mandatory training.

The Chair will regularly monitor induction progress and ensure all Trustees complete the required elements of the programme.

Following completion of the induction process, the Chair and Trustee will undertake a review meeting to:

- Evaluate the effectiveness of the induction programme.
- Identify any additional support required.
- Agree future training and development priorities.

An annual report regarding Trustee induction and training completion may be presented to the Board as part of governance effectiveness monitoring.

Review

This policy will be reviewed every three years or earlier if required due to changes in legislation, statutory guidance, academy trust governance requirements or Trust procedures.

References and terminology within this policy will be reviewed annually to ensure alignment with current DfE, ESFA and governance guidance.

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
Preparation			
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: • Child Protection and Safeguarding Policy • Admissions Policy • Charging and Remissions Policy • SEND Policy • Supporting Pupils with Medical Conditions Policy			
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			