



Thought Piece: Governing Board Evaluation



How's It Going? Why governing board self-evaluation is important

The second core function of governance is about holding to account and it is important that when we hold to account we also evaluate the processes we use.

This article looks at the role that self-evaluation plays in ensuring that governing boards do what they are supposed to do and sets out some tips to help shape the conversations needed. Whilst self-evaluation of your board is not mandatory, it is considered good practice to review your governance practice on a regular basis.

What is governing board self-evaluation?

Evaluation is one of the six features of effective governance and the DfE Governance Handbook defines it as activities which *monitor and improve the quality and impact of governance*. The Handbook lists a number of key activities:

- Regular skills audits
- Processes for regular self-evaluation and review of operation and effectiveness
- Commissioning external reviews of board effectiveness,
- Documentation which accurately captures evidence of the board's discussions and decisions.

Skills Audits

Ideally these should be completed by the end of the first half term so that training and CPD can be sourced and booked. Analysis of the skills audits also helps identify any skill, knowledge and expertise gaps on the board. Skills audits should be iterative and not done once and forgotten about. Perhaps identify one of the governors to lead on skills audit and work with your clerk to ensure that the skills audit analysis is managed effectively and the audit has maximum impact. Think about what last year's audit showed – are the gaps the same? If so you really do need to undertake the training or find a governor! The National Governance Association as recently published a refreshed skills audit for 2021.

Tip – skills audits are not one off activities – perhaps do a mid-year review on those areas where the board was collectively weaker

Processes

Evaluation should not take place in isolation and is an ongoing and iterative activity. One quick way to undertake some immediate evaluation is to include an agenda item on 'Meeting Impact' or what went well and even better if. This gives the meeting an opportunity not only to summarise the key points of the meeting but also gives space to discuss the operation of the meeting; maybe there were too many reports to read or the papers were late; maybe not all the items on the agenda were covered or that you didn't get a chance to ask your questions. Your clerk is there to help and advise you on how to improve on the meeting process.

Tip – use the meeting calendar to set some time aside before the meeting to read the paperwork and prepare your questions.

External Reviews of Governance (ERG)

These reviews supplement and complement your annual self-review and should take place about every 3 years – this gives you time to undertake some of the medium term actions identified by the Reviewer. An ERG can be commissioned from a range of sources including

[National Leaders of Governance](#) and other organisations and consultants such as your Local Authority, Trust Leaders , [IGS](#) and your Diocese.

Undertaking a self-review on an annual basis is also important. Starting in September by setting out clear goals and objectives and monitoring progress and adjusting actions throughout the year is more effective than trying to look back all at once in September. Consider having a standing agenda item on impact as a way of capturing your thoughts and discussions.

Tip – prepare for an external review by regularly undertaking some self-review activities.

Documentation

Minutes and the accompanying paperwork are important not just for audit and Ofsted. Keeping a track of your actions and decisions by having clear, readable and accurate minutes also supporting effective governance practices. Check that your minutes are available as soon as possible after the meeting or ask for an action log.

Tip – reflect on the decisions you have made and ask how do benefit the pupils? This adds some extra depth to your discussions.

And finally

Think about what you need seek assurance about and use that as the baseline for deciding what to evaluate for impact.