

Role description: Trustee

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Confederation
of School Trusts

The voice of school trusts

Role description: Trustee

Introduction

Trustees provide strategic leadership to the trust. They have legal and strategic responsibility for the trust, setting the context for the chief executive and senior team who are responsible for day-to-day operations. They are both charity trustees and company directors.

The trust's articles of association will set out how trustees are appointed and removed, and their usual term length. Appointment is generally by the trust's members, and additional trustees can usually be appointed by the trust board itself (co-opted). Some trusts have trustees elected by parents of pupils at their schools or appointed by related organisations.

About this guidance

This role description sets out some of the key qualities for a trustee of a school trust board. It draws extensively on the Department for Education's [Academy Trust Governance Guide](#) (March 2024), [Annex A – Trust Quality Descriptions](#) (July 2023), [Academy Trust Handbook](#) (September 2024) and the [Academy Trust Governance Code](#) (October 2023). It was published in November 2023 and reviewed in September 2024.

It is intended to assist prospective trustees and trusts looking to recruit board members, and so focuses on the general qualities for trustees rather than specific tasks or specialised knowledge that may be developed whilst in post.

Trusts with a religious character may use trustee to refer to those on the board of a connected charity, and director for people on the school trust board. For brevity, we use trustee to refer to those on a school trust board throughout this document.

Role description

Strategic leadership

- Thinks strategically and can contribute to the development and monitoring of the trust's strategic priorities and goals.
- Understands the key features of effective governance, including tools and techniques for strategic planning, risk management and the principles of effective change management.
- Familiar with the trust's strategic priorities and its charitable objects.
- Appreciates the difference between strategic and operational decisions.
- Aware of national educational policy and the local education context, and how these apply to the trust.
- Understands financial management techniques to ensure the integrity of financial information and to establish and monitor robust financial controls.
- Awareness of people management, including approaches to staff wellbeing, performance management, recruitment, and retention.
- Provides appropriate challenge to ensure that change is in the best interests of children, young people, and the trust overall.
- Uses data to understand school performance and to provide effective challenge to senior leaders.
- Analyses financial data and ask informed questions about income, expenditure and resource allocation and alignment with the strategic plan priorities, and to set a viable financial strategy.
- Acts with honesty, frankness and objectivity taking decisions impartially, fairly and on merit using the best evidence and without discrimination or bias, including challenging the status quo.
- Confident acting as an ambassador for the trust with a wide range of stakeholders
- Connects with and meaningfully engages with stakeholders to inform decision making and ensure the trust is anchored in the needs of the communities it serves and the wider educational system.
- Abides by the principle of collective decision making and stands by the decisions of the board, even where their own view differs.
- Can identify when to seek the advice of the trust's governance professional or an independent external advisor on statutory and legal responsibilities.

People

- Demonstrates commitment to their role and to active participation in governance, beyond board and committee meetings.
- Willing to acquire the knowledge that they need to be effective in their role, with an ongoing commitment to training and development.



- Welcomes constructive challenge and is respectful when challenging others.
- Influences others and builds consensus using persuasion and clear presentation of their views, minimising conflict.
- Demonstrates professional ethics, values and sound judgement, including adherence to the seven principles of public life.
- Recognises the importance of, and values the advice provided by, the trust's governance professionals in supporting the board.

Structures and compliance

- Understands the role, responsibilities and accountabilities of the board, and its three core functions.
- Understands the principles of delegation, and relationships between members, the trust board, sub-committees and school level-governance.
- Understands the legal, regulatory and financial context of the trust.
- Understands the importance of adhering to trust policies.
- Confident speaking up when concerned about non-compliance where it has not been picked-up by the board or where they feel it is not being taken seriously.
- Understands the importance of avoiding, declaring and appropriately managing conflicts of interest.
- Able to identify when specialist advice may be required.

Self-evaluation and performance management

- Ability to hold the executive leadership team to account for effective implementation of the trust strategy and ensure they have the expertise required to fulfil functions delegated by the board.
- Recognises their own strengths and areas for development and seeks support and training to improve knowledge and skills where necessary.
- Obtains feedback from a diverse range of colleagues and stakeholders to inform their own development.
- Capable of evaluating the impact of the board's decisions on pupil outcomes.
- Capable of using regulatory feedback fully to inform decisions about trust development.

Appendix 1: Specific trustee roles

Trustees are required, collectively, to take responsibility for the trust's strategic direction. They should all have a broad understanding and engagement with the full range of the trust's operation.

However, it may be appropriate to have lead trustees in specific areas who can provide detailed oversight and understanding to the board as a whole.

Safeguarding

Leads on maintaining a focus on promoting the welfare of children at all times and developing a culture of safeguarding across the trust.

- Understands the requirements relating to the safeguarding of children in education and relevant legislation, including the Prevent duty.
- Confident in their challenge of executive leaders for monitoring and improving the safety of pupils.
- Understands key safeguarding metrics, including attendance and exclusion.
- Confident in serving as the board's point of contact with the trust lead on safeguarding and reporting back to the board on the effectiveness of the trust's safeguarding practice.

Special Educational Needs and Disabilities lead

Leads on maintaining a focus on providing an inclusive education through the curriculum, student outcomes, accessibility, and inclusive pastoral support:

- Understands the requirements relating to the education of children with Special Educational Needs and Disabilities (SEND), including familiarity with the SEND Code of Practice.
- As may relate to children with SEND, knows the requirements relating to the safeguarding of children in education and health and safety in education.
- Confident and knowledgeable in their challenge to executive leaders on monitoring outcomes for pupils with SEND through headline metrics and verifiers, as well as qualitative information to triangulate any data.
- Confident in their challenge to executive leaders on strategies for monitoring and improving the behaviour and safety of pupils.

Educational outcomes lead

Leads on robust effective oversight of the educational performance of the trust.

- Understands key educational performance metrics, including attainment, progress, attendance and exclusion.
- Able to reviews and analyses a broad range of information and data in order to spot trends and patterns.

- Confident in requesting external advice and guidance when specific expertise is required to support the board's understanding of educational performance.

Finance lead

Leads on robust effective oversight of the appropriate use of funding and effective financial performance.

- Understands the trust's current financial health and efficiency and how this compares with similar organisations both locally and nationally.
- Can use their detailed financial knowledge and experience, which is appropriate for the scale of the trust, to provide advice and guidance to the board.

Staffing and performance lead

Leads on effective oversight of staffing and performance across the trust and ensuring the voice of staff is heard by the board.

- Understands the requirements of relevant regulation and legislation pertaining to employing staff, including the Equality Act 2010 and the Public Sector Equality Duty.
- Knowledgeable about people management issues as they relate to education.
- Understands the trust's processes in relation to teaching and support staff pay, and the role of governance in staffing reviews, restructuring and due diligence.
- Capable of monitoring the outcome of recruitment and pay decisions, including monitoring of equality and diversity.

Careers education lead

Leads on effective strategic oversight of careers education across the trust:

- Understands the requirements of statutory guidance and relevant legislation relating to careers education and access to the full range of providers in secondary schools
- Knowledgeable and up to date about any policy changes relating careers education and the latest recommended practice in careers education in all phases
- Confident in requesting external advice and guidance when specific expertise is required to fulfil statutory responsibilities

Appendix 2: Seven principles of public life

The seven principles of public life (also known as the Nolan Principles) apply to anyone who works as a public office-holder. This includes all those who are elected or appointed to public office, nationally and locally, and all people appointed to work in the Civil Service, local government, the police, courts and probation services, non-departmental public bodies, and in the health, education, social and care services. All public office-holders are both servants of the public and stewards of public resources.

The principles also apply to all those in other sectors delivering public services, including the trustees and executive leaders of school trusts.

1. **Selflessness.** Holders of public office should act solely in terms of the public interest.
2. **Integrity.** Holders of public office must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships.
3. **Objectivity.** Holders of public office must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias.
4. **Accountability.** Holders of public office are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this.
5. **Openness.** Holders of public office should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing.
6. **Honesty.** Holders of public office should be truthful.
7. **Leadership.** Holders of public office should exhibit these principles in their own behaviour and treat others with respect. They should actively promote and robustly support the principles and challenge poor behaviour wherever it occurs.

Appendix 3: Academy Trust Governance Code

The [Academy Trust Governance Code](#) is a voluntary code developed by the sector that draws upon the Seven Principles of Public Life, the Charity Governance Code and relevant Department for Education guidance. It sets out the principles, desired outcomes, and recommended practice for effective governance.

- **Fundamental Principle.** The Academy Trust's Directors are aware of and meet 'The Seven Principles of Public Life', understand the legal, regulatory and contractual obligations they must meet, and have regard to the statutory guidance issued by the Secretary of State.
- **Principle 1: Delivering the Academy Trust Charitable Objects.** The Academy Trust's Articles of Association set out the Academy Trust's charitable Objects and how those must be fulfilled. The Board is clear about its aims and ensures that they are being delivered effectively and sustainably.
- **Principle 2: Leadership.** The Academy Trust is led by an effective Board that provides strategic governance in line with the aims and values of the Academy Trust and engages effectively with its Members.
- **Principle 3: Integrity.** The Board acts with integrity, adopting values and creating a culture which helps achieve the Academy Trust's charitable Objects. The Board is aware of the importance of public confidence and trust in Academy Trusts and their Schools, and the Board undertakes its duties accordingly.
- **Principle 4: Decision making, risk and control.** The Board ensures that its decision-making processes are evidence informed, rigorous and timely and that effective delegation, control, risk assessment and management systems are set up and monitored. There is effective reporting at all levels of Academy Trust governance to ensure decisions are taken at the correct level in accordance with the Articles of Association and Scheme of Delegation.
- **Principle 5: Board effectiveness.** The Board works as an effective team, using the appropriate balance of knowledge, skills, experiences and backgrounds to make informed decisions.
- **Principle 6: Equality, diversity and inclusion.** In ensuring the effective achievement of the Academy Trust's charitable Objects, the Board has a clear, agreed and effective approach to advancing equality, diversity and inclusion throughout the Academy Trust.
- **Principle 7: Openness and accountability.** The Board leads the Academy Trust in being transparent and accountable. The Academy Trust is open in its work, unless there is good reason for it not to be.



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