NAGAS

NATIONAL ASSOCIATION OF GOVERNANCE ADVISORY SERVICES

Succession Breeds Success

Succession planning - introduction

Effective succession planning is essential for governing boards to maintain strong leadership, ensure continuity, and avoid crises. This document, developed by the National Association of Governance Advisory Services (NAGAS), provides a structured approach to building leadership capacity within boards, from recruitment through to chairing.

Strong governance doesn't happen by chance – it's the result of planning, collaboration and a clear vision for leadership. Governing boards face increasing challenges: attracting skilled volunteers, maintaining continuity, and ensuring that leadership roles are filled by confident, capable individuals.

This guide sets out practical steps to embed succession planning into the culture of your governing board. By adopting these strategies, boards can build resilience, strengthen team dynamics and ensure that leadership thrives well into the future.

The key phases of leadership development:

- **Attracting new board members** – building effective recruitment strategies and engaging with your community
- **Developing new governors and trustees** – ensuring robust induction and early identification of leadership potential
- **Taking additional responsibility** – creating opportunities for members to lead on specific areas and grow their skills
- **Growing as a team leader** – supporting those who chair committees or lead working groups
- **Developing the role of vice chair(s)** – clarifying responsibilities and using the role to strengthen distributed leadership
- **Being an effective chair** – modelling best practice and promoting a collaborative, strategic approach
- **Working with co-chairs** – exploring shared leadership models to make the role more accessible and sustainable.

By following these phases, your board can create a culture where leadership is shared, succession is planned, and governance remains strong and effective.

Succession planning

Has your governing board ever found itself in any of these situations?

- No-one was prepared to stand as chair
- The existing chair stayed on, but didn't really want to
- The vice chair has no clearly defined role
- Committees are simply 'talking shops'
- It's usually the same individuals who volunteer to take on a task
- It takes too long for new board members to feel they can contribute
- There are a high number of vacancies on the board
- People don't stay long
- Meetings are often inquorate or poorly attended
- It's hard to recruit
- People are appointed simply because they volunteer, with no strategic plan or consideration of the skills balance around the table.

Clearly, it's important for governing boards to ensure continuity of leadership and to avoid crises within the leadership of the board. So how can these situations be avoided in the first place? The answer is strategic and effective succession planning.

Succession planning in the governing board – how you do it

- Have a strategy in place, rather than 'fire-fighting'
- Attract and retain good governors and trustees
- Spot leadership talent early
- Support and develop leadership skills throughout the governing board
- Have clear expectations and be honest about the commitment involved from the outset
- Create opportunities to practise leadership skills
- Give and receive feedback, value contributions and thank board members
- Provide or facilitate coaching and mentoring
- Develop the governing board as a team
- Delegate fairly and effectively, playing to the strengths and interests of board members
- Encourage others to take up opportunities.

For the individual, succession planning can make life much more interesting as it opens up a range of opportunities for personal development. For the governing board, succession planning ensures future strength and effectiveness. It is easier to achieve smooth succession in a governing board with a fairly stable membership, so where turnover is high, it is even more important to succession plan. This document aims to help your board identify the steps to create a culture in which leadership can thrive.

What does good board leadership look like?

Traditionally, we tend to consider the leadership of the governing board as being vested in the chair (and perhaps the vice chair). However, for a governing board to be truly effective and guard against the impact of rapid change, it needs to distribute leadership. Distributed leadership is common amongst staffing structures in schools and Trusts; where many members of the school staff are seen as leaders and tasks are shared and delegated far and wide.

Effective leadership of the governing board involves working towards a shared vision for the school or Trust which all board members help to achieve, collaborating to share responsibility and workload. Everyone on the governing board must think strategically and work as a team for its leadership of the school or organisation to be robust. Good leadership entails the adoption of effective working practices that enable everyone to fully participate and develop individual leadership skills and strengths.

What can deter people from taking the role of chair?

- Perceived overwhelming demands of the job
- Time constraints and time commitment
- It can take at least two years to feel confident enough to take on a chairing role
- Board members may not be effectively prepared for the role
- Board members hope someone else will volunteer and governing boards fail to develop potential leaders
- Behaviour and attitude of the senior leader or other board members
- The perception that the previous or existing chair is an impossible act to follow
- The level of support available from the clerk or governance professional
- Dealing with complaints
- Additional level of responsibility as an unpaid volunteer.

How to use this document

The following pages contain tables that identify the different phases of leadership development for board members, from recruitment and induction through to becoming an effective chair.

1. Attracting new board members
2. Developing the new governor or trustee
3. Taking additional responsibility
4. Growing as a team leader
5. Developing the role of vice chair(s)
6. Being an effective chair
7. Working with co-chairs.

Each table defines the expectations, actions and strategies that will enable the growth of leaders within the governing board.

1. Attracting new board members

An effective governing board is the best recruitment tool of all. Don't wait for vacancies to arise before developing effective recruitment strategies such as engaging parents and carers with the work of the board and actively encouraging community and business links. Your skills audit is essential to the recruitment process so you can have a real understanding of what your governing board needs.

Expectations

Actions and strategies

The governing board knows that its collective effectiveness is the best recruitment tool and encourages board members to stay and develop leadership skills.

- Agree and publish a shared vision between the senior leadership team, governors and trustees of what the school's leadership will look in five years' time (staff and board)
- Sign up to a Code of Conduct and Scheme of Delegation that underpins effective, transparent team working, shares the workload and encourages all to get involved and gain leadership experience
- Build relationships between board members and between the board and school staff, (including the clerk or governance professional), based upon mutual trust and respect
- Encourage all governors and trustees to participate in all aspects of the board's work
- Change roles within the board regularly to ensure individuals gain experience across a wide range of work
- Audit governing board skills, experience, training and development needs
- Ensure that the corporate nature of governance and collective responsibility is understood and observed
- Review structures regularly to ensure the board meets statutory requirements and that workload and experience are shared.

The governing board reaches out to its community and ensures that potential recruits are clear about the purpose, work and expectations of the board.

- Publicise the work of the board, e.g. newsletter, informal presence at parents' evenings, school council, website
- Organise open evenings/sessions for interested parties, reach potential recruits through social media channels
- Approach and build relationships with local companies and community groups
- Invite potential governors or trustees as observers or appoint them as associate members
- Be honest about the commitment needed to be an effective member of the board
- Agree and publicise an expenses policy
- Don't wait until you have a governor vacancy! A good approach is to look at recruitment as an ongoing process, so that when a place comes up you may already have people who are eager to become involved
- Ensure that the timing of meetings is no disincentive to recruitment, and allows for a satisfactory work-life balance for both school staff and board members.

The board makes use of available recruitment resources.

- Use local authority (LA) materials, the NGA skills audit, Diocesan resources or DfE-published recruitment materials. Existing governors and trustees may have social networks they could use, such as LinkedIn
- Contact Governors for Schools and Reach Volunteering who can assist with recruiting skilled individuals interested in becoming school governors or trustees.

2. Developing the new governor or trustee

Effective induction of new governors and trustees is crucial to ensure their retention on the governing board. If they engage through induction they will be more able to contribute effectively and feel part of the governance team early on. Remember that induction has two strands: from the governing board itself, alongside more formal training looking at the roles and responsibilities of board members, including safeguarding.

Expectations	Actions and strategies
The board ensures that all new members are made welcome and supported in their development.	• Find out whether those who were recently recruited felt they were welcomed and given sufficient support so that they could make a contribution from the start • Develop and implement an induction policy for your governing board, identifying what information new board members need to be given, taking account of most recent recruits' views • Identify an individual to oversee the induction of new members (this may be the clerk/governance professional) • Provide new board members with a mentor – an experienced member of the board to ease their induction • Encourage new governors and trustees to attend induction, safeguarding and other relevant training • Ensure that all contributions are recognised and valued • Review the induction process regularly and seek feedback from new board members on possible improvements.
The board identifies those with potential leadership capability early on and nurtures leadership skills.	• Agree and publish a clear description of who is responsible and accountable for what, including terms of reference for committees and for individual board roles, so everyone is clear on delegation and reporting mechanisms • Audit the skills, knowledge and experience of new members to establish their interests and development needs • Identify those with leadership potential and an interest in developing it • Explain the future leadership opportunities available within the governing board • Encourage the early adoption of additional responsibilities by those with the relevant potential.
The new governor or trustee contributes to the effectiveness of the governing board.	• Discuss with your mentor what skills, interests and experience you bring • Be realistic and clear about the level of commitment you can give • Seek opportunities and offer to take on additional responsibility if and when appropriate • Offer feedback on the effectiveness or otherwise of your induction • Seek feedback on your own contribution to the work of the governing board • Attend relevant training and development opportunities • Familiarise yourself with the resources and support available to you to enable you to fulfil your role effectively.
The new individual has a positive impact on the effectiveness of the governing board.	• Effective induction is a planned process, over weeks and months, allowing individuals to grow into their role • Through discussions with one or more board members, identify what has gone well and what could be improved • The new board member is confident to contribute at meetings and is ready to take on delegated responsibilities.

3. Taking additional responsibility

An effective board motivates and enables all members to play a strategic role in school or Trust improvement and development work, such as:

- Joining a committee and/or taking the lead for a specific area within the School (Trust) Development Plan or board self-evaluation priority
- Leading on a specific area of the board's work (e.g safeguarding or community engagement) or being part of a task and finish/working group
- Leading on an agenda item
- Taking on a specific area of additional responsibility such as headteacher appraisal.

Expectations

The governing board knows and deploys the skills, experience and interests of all members.

The board creates opportunities to take on additional responsibilities and develop leadership skills.

The board encourages and supports those taking on additional responsibilities and developing leadership skills.

Individuals taking on additional responsibilities fulfil their responsibilities to the best of their ability and reflect on learning.

Those taking on additional responsibilities have a positive impact on the effectiveness of the governing board.

Actions and strategies

- Create opportunities for board members to get to know each other socially
- Conduct a skills, experience and interests audit , include a brief pen-portrait in relevant documents
- Match skills, experience and interests to known and anticipated roles and tasks – but enable new challenges by changing roles as experience grows.

- Review structures and ways of working to create opportunities for members to take on additional responsibilities
- Give one or more board members the task of finding out from other governing boards how they structure and manage their workload
- Encourage those with a moderate amount of experience with your board to mentor new board members
- Encourage, value and facilitate feedback from board members on their additional responsibilities.

- Offer mentoring
- Make sure the board members understand the boundaries of any additional responsibility and what is expected
- Facilitate meetings with relevant members of staff
- Promote appropriate training and development
- Develop policies and protocols with staff and board members to facilitate visits to school(s)
- Provide opportunities to network with individuals with similar responsibilities from other governing boards.

- Make use of all available support and guidance
- Keep to timescale and deliver what has been agreed
- Report to the board/committee as appropriate and act within agreed levels of delegation
- Liaise and network with those fulfilling a similar role on other governing boards
- Reflect on any new leadership skills you have developed and next steps.

- Through discussions with board/committee members, identify what has gone well and what could be improved
- The board member contributes to the effectiveness of the corporate board
- The board member fulfils their delegated responsibilities in an appropriate and timely manner
- The board member understands their approved level of delegation and reports back appropriately.

4. Growing as a 'team leader'

Leading a team as part of the governing boards work could involve chairing a committee or leading a task group or working party. An effective committee chair doesn't simply run a meeting; they ensure that all committee members have an opportunity to contribute, especially those reporting back on their additional responsibilities, and forge positive relationships with other individuals involved, ensuring that members' strengths, skills and interests are recognised and utilised to help achieve the committees objectives. The role of the chair of a committee is vital to the effective contribution of the committee to the strategic operation of the board. The chair will coordinate the work of the committee, to fulfil any relevant statutory obligations on behalf of the board and ensure that the committee contributes effectively to the annual cycle of business. The committee chair will need to work with the chairs of other committees, the chair of the board, the headteacher or principal and the clerk to make sure there is no duplication across the committees and the board. Working with the clerk or governance professional, a committee chair will set strategic agendas and ensure that the committee has the information it needs to operate effectively.

Expectations	Actions and strategies
The governing board defines and agrees the role of the team leader.	• Agree and publish the job description and/or terms of reference • Ensure clear parameters of delegation of authority and reporting-back procedures • Make sure expectations and timeframes (on both sides) are clear and understood.
The governing board identifies and nurtures the leadership skills of board members.	• Identify individuals with the potential to become team leaders • Encourage them to take on these roles • Enable shadowing of more experienced team leaders either on your own or another governing board • Offer mentoring (internal or external) • Offer support at initial meetings and ongoing support as the role develops • Encourage attendance at effective chairing or other relevant training • Encourage provision of feedback on leadership skills.
Individuals taking on additional areas of leadership work effectively and reflect on learning points.	• Take advantage of support, guidance and training offered, ask for guidance or help where needed • Fulfil expectations of role, ensure that meetings are effectively planned and chaired, stay strategic and focus on the identified areas of responsibility • Liaise and network with governors fulfilling a similar role on other governing boards • Seek feedback on how well you have fulfilled the role • Reflect on the new leadership skills you have learned.
Team leaders have a positive impact on the effectiveness of the governing board.	• Through discussions with one or more board members, identify what has gone well and what could be improved • The chair may formulate a committee development plan at the beginning of the academic year, consistent with the priorities of the governing board and the school/organisation • Encourage the continued personal development of the members' knowledge and understanding, including through recommending relevant training.

5. Developing the role of the vice chair(s)

The role of vice chair offers plenty of scope for the development of leadership skills. For example, they could be a champion of distributed leadership among the governing board, be an active role model to new board members and contribute to agenda setting . Boards should use the time, commitment and skills of the vice chair to lighten the load for the chair and contribute to the efficient working of the board. Developing a close working relationship with the chair is essential.

Expectations	Actions and strategies
The governing board defines the role of vice chair.	- Agree and publish the role description - Agree if there is an expectation that the vice chair will take on the chairing role in the future - Include the definition in relevant documents - Agree the term of office of the vice chair prior to an election and record it.
The vice chair actively develops knowledge, skills and understanding to share the workload with the chair and board.	- Review the chair's workload to establish which tasks you could take on - Attend relevant briefings - Attend training on chairing skills - Join meetings with chair, senior leader and clerk/governance professional - Link with vice chairs of other governing boards - Ensure you keep abreast of school/Trust priorities, and the local and national direction impacting the board.
The vice chair shares some of the chair's workload.	- Maximise the effectiveness of communication between you, the chair(s) and the clerk/governance professional - Take on specific responsibility, e.g. analysing the skills audit and driving board succession planning & recruitment - Work collaboratively with the chair, senior leader and clerk/governance professional, to help ensure that nothing is missed and the purpose of agenda items is clear (and strategic) - Chair particular agenda items on a regular basis and chair some full governing board meetings - Lead on parental and staff engagement, analysing the results of the boards' questionnaires to their stakeholders and suggesting strategies for the board to consider in order to address any issues identified - Ensure and support individuals to fulfil actions they have been assigned in a timely manner - Shadow the chair, joining conversations, briefings and meetings that the chair participates in, helping to build knowledge and professional relationships with key stakeholders - Hand over role to well-prepared successor(s) and if still a board member, serve as mentor to others.
The vice chair has a positive impact on the effectiveness of the governing board.	- Through discussions with one or more other board members, including the chair, identify what has gone well and what could be improved - Consider if the governance structure currently in place is fit for purpose, working with the clerk/governance professional to suggest other ways the board could work to be more strategic or avoid duplication.

6. Being an effective chair

An effective chair gives a clear lead in organising and evaluating the board's work, valuing the contribution of all members and staff. Delegates roles and ensures everyone is fully involved. Works in partnership with the senior leaders through regular meetings, providing appropriate support and challenge. Co-operates with other agencies to support school improvement. Operates as the first among equals, but actively models and promotes the development of leadership skills. Encourages the development of the vice chair role.

Expectations	Actions and strategies
The governing board defines the role of chair.	- Agree and publish the role description, ensure expectations are clear, and shared - Agree the term of office of the chair prior to an election and record it.
The chair actively develops knowledge, skills and understanding to share the workload with the vice chair and board.	- Attend relevant training, preferably before assuming the role - Keep up to date with school/Trust priorities, and the local and national direction impacting the organisation - Seek a mentor (from within the board, or externally from another board) - Mentor the vice chair(s) and share workload with vice chair(s) and other board members - Network with other chairs to share best practise, collaborate and compare models of governance - Contribute, where appropriate, to governance beyond the school (e.g. in localities, federations or clusters; as mentor to chairs in other governing boards) - Annually seek feedback from vice chair(s), headteacher and governors on own performance - Encourage regular review of the effectiveness of governing board structures and working practices.
The chair shares workload with vice chair(s) and delegates tasks and responsibilities to the governing board.	- Create opportunities for board members to take responsibility and bring together a group of individuals from different backgrounds and with different experiences and skills to form a cohesive team - Encourage support and challenge at meetings and ensure that contributions are recognised and valued - Demonstrate the highest standards of integrity and set clear expectations concerning the culture, values and behaviours, and the style and nature of board discussions. Develop the governing board as a team - Meetings are strategic and well run with demonstrable positive impact for pupils, staff and the wider community - The chair should be able to listen to and understand a wide range of views, present information clearly and concise and get clarification of relevant points, thus enabling the board to make effective decisions - Hand over role to well-prepared successor(s) and if still a board member act as mentor for others.
The chair has a positive impact on the effectiveness of the governing board.	- Through discussions with other board members identify what has gone well and what could be improved - The chair has established and promotes a strong professional relationship with senior leaders, board members and the clerk/governance professional, based on mutual respect and understanding - Board members fulfil their role effectively and understand the strategic nature of the boards work - Senior leaders are empowered, supported and appropriately challenged by the board.

7. Working with co-chairs

We need to acknowledge that taking on the role of the chair can be daunting and it can be difficult to find an individual who has not only the will and the skill, but also the time to commit to the role. The prospect of sharing the position, playing to the strengths of each of the co-chairs and knowing that there is someone to share the load and the responsibility with can make the role much more achievable for a greater range of people, including busy 'professionals'. The DfE regulations allow maintained schools to operate with co-chairs, academy schools will need to check their articles.

Expectations	Actions and strategies
The governing board defines the role of co-chairs.	• Agree the reasons for having joint chairs and if the board is happy to adopt a co-chair model and is satisfied that it will not lead to any lack of clarity in leadership. (Diocesan Trusts are often encouraged to have a sole chair) • Determine the parameters of the joint chair arrangement, agree the terms of office of the joint chairs prior to an election and record it. In a co-chair model two individuals put forward one nomination, so the board would cast one vote to elect both individuals, rather than choosing between the two.
The co-chairs agree how they will work together, share the workload with vice chair(s), delegate tasks and responsibilities to the governing board.	• Agree and share with the governing board and school leadership how the co-chairs will share responsibilities, including who is leading on each area of the boards work. (This should be confirmed within terms of Reference) • Develop effective working relationships with clerk/governance professional and senior leaders • In a co-chair model the vice-chair role may become even more nebulous; make the most of vice chair(s) and utilise their time, commitment and skills to lighten the load for the chairs and contribute to the efficient working of the board. Mentor vice chair(s) • Seek feedback from each other, vice chair(s), senior leaders and board members on the impact and effectiveness of the model. Review the model regularly and adapt terms of reference where needed.
The co-chairs actively develop knowledge, skill and understanding to prepare for handover and share the workload with the vice chair(s) and board.	• Jointly and separately follow good practice as recommended for chairs of governing boards • Play to the strengths and skill set of each individual. One could chair meetings, whilst the other undertakes school-based activities, or leading meetings could be alternated • Share knowledge and expertise and act as a trusted sounding board for each other • Ensure that senior leader workload (and that of the clerk/governance professional) is not doubled by working with two people – have clear lines of communication and responsibility • Review the arrangement regularly to ensure workload is equitably shared and communication between the co-chairs and the wider board is effective.
The co-chairs have a positive impact on the effectiveness of the governing board.	• Through discussions with other board members identify what has gone well and what could be improved • The co-chairs have established and promote a strong professional relationship with senior leaders, board members and the clerk/governance professional, based on mutual respect, trust and understanding • Board members fulfil their role effectively and understand the strategic nature of the boards work • Senior leaders are empowered, supported and appropriately challenged by the board.

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This is the fourth edition of the National Association of Governance Advisory Services (NAGAS) document "Succession Breeds Success" which has been created to assist boards in managing the succession process in a positive and constructive way so that governance and board leadership, including local tier governance in MATs, is strong and effective in holding the school or organisation to account. It may be used in whole or part by governors, trustees, governance professionals, service providers and others, on the understanding NAGAS is acknowledged as the source.

NAGAS represents organisations and individuals providing support, advice, guidance and training for boards, clerks and governance professionals. NAGAS exists to give a national voice and support to its members, and to promote high-quality governance in schools and academies. Established in 1992, the organisation includes members who work with MATS, SATs, maintained schools, federations, special schools, colleges, sixth forms and PRU's alongside Diocesan representatives, LA governor services teams, independent consultants and traded services. The national NAGAS board also provides a mechanism for professionals working in services supporting governance in schools and settings to access a range of materials, resources, information, advice, CPD and development opportunities. NAGAS helps to influence and initiate national policy by identifying common themes emerging from the regional membership and communicating the outcomes to support the continuous improvement of governance support services nationally.

NAGAS works alongside, and collaborates with, other organisations to promote strong and effective governance including the Department for Education (DfE), Confederation of School Trusts (CST), National Governance Association (NGA), Governors for Schools and Trust Governance Professionals (TGP). You can find out more about NAGAS' work and that of the membership regions on the website www.nagas.org.uk

If you are interested in joining one of the eight regional groups, please contact your local chair, via the NAGAS website. You will be sure of a warm and supportive welcome!
Fiona Collier
NAGAS Chair

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