
Clear Roles and Boundaries

Purpose: When responsibilities are unclear, they create duplication, increase workload and weaken accountability.

This tool helps boards:

- clarify responsibilities;
 - reduce role-drift;
 - strengthen accountability;
 - improve decision-making; and
 - focus governance activity on areas where it adds greatest value.
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TOOL 1.1: Governance Or Operational?

Use this decision tool whenever responsibility is unclear.

Question 1

Is this about:

- strategy?
- long-term direction?
- organisational priorities?
- significant risk?

YES → Governance

NO → Question 2

Question 2

Is this about:

- implementing strategy?
- leading delivery?
- managing performance?

YES → Executive Leadership

NO → Question 3

Question 3

Is this about:

- day-to-day operations?
- routine management?
- service delivery?

YES → Operational Management

Quick Reference

If it is about...	Responsibility
Strategy	Governance
Accountability	Governance
Risk	Governance
Resources	Governance
Assurance	Governance
Delivery	Executive Leadership
Management	Operational Management
Daily Activity	Operational Management

TOOL 1.2: One-Page Role Map

Role	Focus On	Avoid
Chair	Leadership, strategy, board effectiveness	Operational management
Governor/Trustee	Challenge, oversight, assurance	Day-to-day management
Governance Professional / Clerk	Providing independent governance advice, ensure compliance with legal and regulatory requirements, manage meeting administration, minutes and documentation.	Operational administration
Governance Lead	Governance systems and development	Managing operational activity

TOOL 1.3: Role-Drift Diagnostic

Score: Never = 0; Sometimes = 1; Often = 2

Question	Score
Governors become involved in operational activity	
Governors solve operational problems	
Complaints bypass established processes	
Governance becomes the escalation point for everything	
Governance professionals / clerks compensate for weak systems	

Results

Score	Rating
0–3	Green: Roles are generally clear.
4–6	Amber: Review responsibilities and delegation arrangements.
7–10	Red: Role-drift is affecting governance effectiveness and workload.

TOOL 1.4: Boundary-Setting Prompts

Use these prompts when responsibilities become unclear.

Operational Issue: This appears to be an operational matter and is therefore best managed through the appropriate management processes.

Chair Overload: Operational ownership should remain with school leadership. Governance should maintain strategic oversight and to consider how the Vice-Chair role supports functions that may be delegated.

Governance Professional / Clerk Overload: This task may fall outside governance responsibilities. Can we identify the appropriate owner?

Complaints, Grievances, Exclusions and other panel work: Policy and procedure must always be followed before governance involvement is considered

Case Study Snapshot

Challenge: A Chair found it difficult to balance supporting and challenging an Executive Headteacher. Governance discussions sometimes became blurred between professional challenge and personal criticism.

What helped: Conversations were clearly signposted to distinguish support, challenge and decision-making discussions.

Impact: Greater clarity, more constructive challenge and clearer governance boundaries.

Related Toolkit Tool(s): Tool 1.1 Governance or Operations and Tool 1.4 Boundary-Setting Prompts.

TOOL 1.5: Is This Governance Work?

Answer Yes or No.

Question	Yes	No
Is this about strategy?	☐	☐
Is this about accountability?	☐	☐
Is this about risk?	☐	☐
Is this about resources?	☐	☐
Is this about assurance?	☐	☐
Does the board have a statutory responsibility?	☐	☐

Results

4–6 YES: Governance work.

2–3 YES: Shared discussion required.

0–1 YES: Probably not governance work.

If the answer is No, ask:

- Does this belong with executive leadership?
 - Does this belong with operational management?
 - Does this belong within an existing organisational process?
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