

Workload And Governance Efficiency

Purpose: When governance becomes less effective, time is often spent on activities that add little value.

This tool helps boards:

- reduce avoidable workload;
- improve governance efficiency;
- improve governance documentation;
- improve meetings; and
- focus on strategy, accountability, risk, assurance and resources.

TOOL 2.1: Governance Workload Health Check

Score:

- Rarely = 0
- Sometimes = 1
- Often = 2

Question	Score
Agendas exceed 15 items	
Meetings exceed 2 hours	
Governance documentation arrives late	
Governance documentation exceeds 200 pages	
Reports duplicate information	
Committees repeatedly discuss the same issues	
Committee discussions are repeated at the full board.	
Governors struggle to prepare	
Decisions are delayed	
Governance professional / clerk workload is increasing	
Governance activities are added but rarely removed	

Results

Score	Rating	Action Required
0–5	Green (Low)	Follow standard procedures
6–12	Amber (Moderate)	Additional oversight and training recommended
13–20	Red (High)	Governance review recommended

TOOL 2.2: Stop, Reduce, Delegate or Continue

For every governance activity ask:

Is it legally required?

YES → Continue performing the activity

NO → Next question

Does it support:

- strategy?
- accountability?
- risk?
- resources?
- assurance?

YES → Continue performing the activity

NO → Next question

Does it improve decision-making?

YES → Continue performing the activity

NO → Stop, Reduce or Delegate

Key Question: How will this impact on the effectiveness of governance?

TOOL 2.3: Agenda Quality Check

For each agenda item ask:

Question	Yes	No
Does this support strategy?	☐	☐
Is a decision required?	☐	☐
Does the board need assurance?	☐	☐
Does this relate to risk?	☐	☐
Is governance action required?	☐	☐
Could this be shared outside of the meeting?	☐	☐
Is this operational rather than strategic?	☐	☐

Suggested Agenda Structure

- **Opening Business (10%)**
 - Declarations
 - Constitution / Membership
 - Previous actions
- **Strategic Discussion (40%)**
 - Priorities
 - Future planning
 - Major risks

- **Accountability and Assurance (30%)**
 - Performance
 - Finance
 - Compliance
- **Decisions (20%)**
 - Approvals
 - Key decisions

Please note, this is not a comprehensive agenda structure; please refer to the [NAGAS Clerking and Governance Professionals' Handbook](#) for further guidance (see the example of a maintained school / academy annual cycle checklist section).

TOOL 2.4: Effective Governance Documentation Review Framework

For every item of governance documentation, you should ask:

- Why is this being presented?
- What decision is required?
- What assurance is needed?
- What risks should be considered?
- What action is recommended?
- What outcome / impact are we expecting and how will we measure it?

Suggested Reporting Framework

- Purpose
- Key Issues
- Risks
- Recommendations
- Required Action
- Expected Outcome / Impact

TOOL 2.5: Meeting Reset Checklist

Consider using these options when meetings regularly overrun:

- ☐ Agenda planning meeting (Chair, Headteacher and Governance Professional / Clerk)
 - ☐ Reduce the number of agenda items
 - ☐ Time-limit each agenda item
 - ☐ Use dashboards
 - ☐ Review committee structure
 - ☐ Remove duplication
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Case Study Snapshot

Challenge: Following an Ofsted judgement and governor vacancies, remaining governors carried increased responsibilities and oversight demands.

What helped: Hybrid meetings were introduced and governance activity was focused on key priorities.

Impact: Improved attendance, better decision-making and clearer challenge.

Related Toolkit Tool(s): Tool 2.3 Agenda Quality Check and Tool 2.5 Meeting Reset Checklist.

TOOL 2.6: Governance Annual Planner

Below are suggestions only, for more templates and additional resources, visit the Resources page on our website: [Governance Workload and Wellbeing Toolkit | NAGAS](#)

Activity	Timing
Strategic priorities	Autumn
Risk review	Autumn
Budget planning	Spring
Performance review	Spring
Budget approval	Summer
Governance review	Summer
Board evaluation	Summer

Exemplar annual work programme: see resources on the NAGAS website.

Case Study Snapshot

Challenge: A parent governor with full-time employment and caring responsibilities found it difficult to manage governance commitments alongside family and work.

What helped: The experience highlighted the importance of timely papers, focused agendas and careful planning of governance activity.

Impact: Demonstrates why boards should consider workload implications when planning governance activity and sharing expectations with governors.

Related Toolkit Tool(s): Tool 2.1 Governance Workload Health Check and Tool 2.6 Governance Annual Planner.

School name/logo here

FGB Work Programme 2026-27

Autumn 1	Autumn 2	Spring 1	Spring 2	Summer 1	Summer 2
Strategic	Strategic	Strategic	Strategic	Strategic	Strategic
• Agree SDP • Review of Pupil performance 2026 • Agree Pupil Premium strategy • Sports Grant impact • SFVS planning • Pay Committee TOR and membership • HT Appraisal Committee membership • GB structure, TofR, monitoring schedule.	• September FMR • Draft 2026/27 budget plan • Ofsted Inspection Data Dashboard • Surrey EYFS data • Safeguarding Audit progress • Progress data capture 1 • Governor monitoring visit reports • Attendance Review	• FMR • SFVS approval • Three Year Budget Plan • Buy backs 2027-28 • Admissions Update • Pay Committee minutes • Review of Safeguarding Audit – actions required • Attendance Review	• Pupil Performance – assessment update data capture 2 • Safer Recruitment review • Pupil/staff survey feedback • Budget approval • Parental Survey feedback • Governor monitoring visit reports 'implementation & impact	• Pupil Performance spring term too early • FMR • Budget approval • Staffing structure 2027/28 • School fund account • Admissions update • SFVS – review of actions required • Attendance Review	• SATs – initial outcomes if final meeting early enough (summer 2027) • EYFS outcomes • Review of school website • Annual H&S Report • Financial benchmarking CFR • School Fund • Governor monitoring 'impact' • Governor input into SDP planning
Headteacher Report verbal	Headteacher Report written	Headteacher Report verbal	Headteacher Report written	Headteacher Report verbal	Headteacher Report Written
Information	Information	Information	Information	Information	Information
• New SEF • Attendance data • GB self-evaluation	• Behaviour incident report • CPD update/impact	•	• Behaviour incident report • Admissions update	• H & S annual report • Filtering & Monitoring Report	• Behaviour incident report • CPD update/impact
Policy Review	Policy Review	Policy Review	Policy Review	Policy Review	Policy Review
• SEND • Safeguarding	• Whistleblowing	• Appraisal • Pay	• Behaviour • Safer Recruitment	• Charges & Remissions	• Governor Expenses

Governance Annual Planner

Agendas, Assurance and Monitoring 2026/27

This planner supports a nine-meeting model: one whole-board meeting and one finance/resources and one education/standards committee meeting each term. It is a cross-sector template, so items marked Academy trust or Maintained school should be used only where relevant.

The board remains collectively accountable and should adapt the cycle to its scheme of delegation, committee terms of reference, local authority requirements, funding agreement, articles of association and current risks.

Notes to Consider

2026/27 additions to allocate within the cycle:

Academies: designated governance oversight of inclusion and SEND for academy trusts; evidence of co-operation with local authorities and other agencies where duties apply; the strengthened academy trust controls for executive pay, chief financial officer qualifications, special severance payments and specified procurement routes.

Maintained schools: oversight of allergy safety duties, digital and technology infrastructure, cyber security, sustainability leadership and climate action planning, diversity data, the inclusive mainstream fund, free school meal expansion funding and the limit on branded school uniform and PE kit items. Each item should have a named board or committee owner, an evidence source and a review date.

Source basis: [Academy Trust Handbook 2026](#); [Academy trusts: governance guide](#); and [Maintained schools: governance guide](#). “Must” denotes a legal, regulatory or contractual requirement; “should” denotes minimum good practice unless an alternative approach is justified. This planner supports agenda preparation and assurance but is not, on its own, a complete compliance, statutory policy, publication, filing or prior-approval register. Check the live guidance, the Academy Trust Handbook Schedule of Musts, current DfE reporting deadlines, local authority requirements and organisation-specific governing documents before approving the annual cycle.

Remaining compliance gaps: this planner does not yet provide a complete deadline and approvals register.

Academy trusts should add the exact DfE dates for budget and financial returns, audited accounts, the annual report, external audit and internal scrutiny reporting; a recurring check that governance changes are entered on Get Information about Schools within 14 calendar days; website and Companies House filing checks; and explicit controls for related-party transactions, novel, contentious or repercussive transactions, borrowing, indemnities, guarantees, write-offs, compensation payments, asset disposals and special severance payments requiring prior DfE approval.

Maintained schools should add local authority budget and reporting dates, statutory policy and website publication checks, Get Information about Schools updates, and any requirements linked to the school’s category, admissions authority, religious character or foundation arrangements. Both sectors should maintain a separate policy schedule covering review frequency, approval route, consultation, publication and the named owner for each statutory policy.

Ownership and evidence key: for each scheduled item, record whether it is a must, should or local requirement; the responsible board, committee or individual; the evidence expected; the decision or assurance required; the due date; and the route for reporting exceptions. Committee consideration does not remove the board’s collective accountability, and reserved matters must remain with the full board.

Term	Whole board	Finance, resources, audit and risk	Education, standards and inclusion	Monitoring and assurance
Autumn	• Confirm governance structure, membership, committee remits, delegated authority and meeting calendar. • Complete annual declarations of interests; review and publish the register and required governance information. • Review code of conduct, conflicts procedure, skills, training, succession and governance development priorities. • Approve strategic priorities, improvement plan and board assurance map; review summer outcomes and self-evaluation. • Receive safeguarding, attendance, behaviour, suspensions/exclusions, complaints, whistleblowing, equality and health and safety assurance. • Academy trust: confirm compliance with the funding agreement, articles and Academy Trust Handbook; review member oversight and local governance arrangements.	• Approve the annual finance timetable, budget monitoring format, financial risk priorities and delegated limits. • Review management accounts, cash flow, reserves/deficit recovery, pupil number assumptions and three-year financial plan. • Review estates condition, compliance, safety, accessibility, sustainability and capital priorities. • Review procurement pipeline, contracts, value for money, cyber security, data protection and business continuity. • Academy trust: approve the internal scrutiny programme; review audit findings, management letter, annual accounts process, related-party transactions, gifts and hospitality, executive pay and CFO capacity/qualifications. • Maintained school: review local authority financial procedures, Schools Financial Value Standard preparation, private funds and scheme of delegation.	• Review outcomes and progress for all pupils, with explicit focus on SEND, disadvantaged pupils, children known to social care and other vulnerable groups. • Evaluate curriculum quality, teaching, assessment, school improvement priorities and destination/readiness measures where relevant. • Review attendance, persistent and severe absence, behaviour, suspensions, exclusions and alternative provision. • Review pupil premium and PE and sport premium impact and publication requirements. • Assure safeguarding arrangements against current statutory guidance, including safer recruitment and the single central record. • Review inclusion strategy, accessibility, medical needs, equality objectives and stakeholder voice.	• Approve a risk-led visits and monitoring schedule, with clear questions, evidence and reporting routes. • Safeguarding and single central record check. • Finance control check: monthly reports, reconciliations, purchase cards, payroll and separation of duties. • Estate compliance and condition walk, including fire, asbestos, water hygiene and accessibility assurances. • Pupil, staff and community voice linked to strategic priorities. • Headteacher/CEO objectives and performance management arrangements confirmed by the appropriate panel.

	• Maintained school: confirm instrument of government, committee/delegation arrangements and publication requirements.			
Spring	• Review progress against strategy, improvement priorities, board objectives and principal risks. • Receive a mid-year educational, workforce, finance, estates and compliance assurance report. • Review board/committee effectiveness, attendance, vacancies, skills gaps and succession actions. • Review statutory and key policies due in the cycle; confirm consultation and publication where required. • Receive safeguarding, attendance, behaviour, complaints, equality, health and safety and stakeholder engagement updates. • Test whether delegated decisions and local governance are operating as intended.	• Review management accounts, forecast outturn, cash flow, reserves, recovery plans and value for money. • Review risk register, internal controls, fraud and irregularity, cyber security, data protection and business continuity testing. • Review staffing structure, workforce costs, absence, recruitment, retention, wellbeing and pay progression assurance. • Review estates maintenance, capital delivery, energy, sustainability and procurement performance. • Academy trust: review internal scrutiny reports and management actions; confirm related-party transaction and delegated-authority compliance. • Maintained school: approve and submit the Schools Financial Value Standard by 31 March; prepare the next budget	• Review pupil progress and attainment, including cohort and group variation and the impact of intervention. • Evaluate progress in curriculum, teaching, early years/sixth form where applicable and school improvement. • Review SEND provision, inclusion, attendance, behaviour, suspensions/exclusions, alternative provision and safeguarding trends. • Review staff development, workload, wellbeing and leadership capacity as they affect educational quality. • Test the impact of pupil premium, PE and sport premium and other targeted funding. • Review careers, destinations, personal development and pupil voice where relevant.	• Targeted monitoring of the highest strategic and operational risks. • Learning and curriculum visit linked to improvement priorities, without straying into operational inspection. • SEND and inclusion assurance, including accessibility and reasonable adjustments. • Finance and internal-control follow-up against audit or scrutiny actions. • Cyber security and business continuity test assurance. • Mid-year review of headteacher/CEO objectives by the appropriate panel.

		in line with the local authority timetable.		
Summer	• Evaluate delivery of strategy, improvement plan, board objectives and governance impact; agree priorities for 2027/28. • Complete annual board self-evaluation and review skills, composition, succession, training and committee effectiveness. • Approve the next annual governance calendar, committee remits, delegated authority and monitoring programme. • Review year-end safeguarding, attendance, behaviour, complaints, equality, health and safety and stakeholder assurance. • Review leadership capacity and succession planning. • Academy trust: review trust-wide inclusion and collaboration, local governance effectiveness and readiness for year-end reporting. • Maintained school: review compliance with local authority requirements and confirm the	• Approve the next budget and three-year financial plan at the appropriate point; test assumptions, sensitivity, reserves and affordability. • Review final forecast, financial sustainability, going concern, estates/capital plan and procurement pipeline. • Review the annual risk and assurance opinion and progress against audit/internal scrutiny actions. • Review insurance, contracts, service agreements, cyber security, data protection and business continuity for renewal. • Academy trust: approve budget forecasts and returns by DfE deadlines; plan annual accounts, external audit and internal scrutiny reporting; confirm procurement arrangements, including current DfE requirements for energy, supply staff and management information systems. • Maintained school: approve the budget by the local	• Review provisional outcomes and year-end progress against educational priorities and statutory duties. • Evaluate curriculum, teaching, inclusion and intervention impact; agree priorities for the next improvement plan. • Review year-end SEND, disadvantaged and vulnerable-group outcomes, attendance, behaviour, suspensions/exclusions and alternative provision. • Approve or review statutory publication plans for pupil premium, PE and sport premium, equality and accessibility. • Review safeguarding effectiveness and agree priorities for the next annual cycle. • Consider pupil, parent, staff and community feedback in strategic planning.	• Complete the annual programme of visits and report themes, impact and unanswered assurance questions to the board. • Year-end safeguarding and single central record assurance. • Premises, health and safety, accessibility and sustainability review feeding the next estates plan. • Follow up finance, audit, risk and compliance actions. • Review board information quality and whether reporting enables effective challenge. • Prepare induction, training and succession activity for the new governance year.

	next year's budget and governance timetable.	authority deadline, monitor year end and review private funds/audit arrangements.		
Every meeting	• Record apologies, attendance, quoracy, declarations and management of conflicts; approve minutes and review actions. • Keep strategy, educational quality, inclusion, safeguarding, finance, workforce, estates, risk and compliance in view, proportionate to the meeting's remit. • Receive concise exception and trend reporting; record challenge, evidence, decisions, delegated authority and follow-up. • Consider whether confidential items, publication, stakeholder communication or escalation are required. • Review material changes in risk, serious incidents, fraud, cyber incidents, whistleblowing, complaints and regulatory correspondence promptly rather than waiting for the scheduled term.			