NAGAS

NATIONAL ASSOCIATION OF GOVERNANCE ADVISORY SERVICES

Workload and Wellbeing Toolkit

2026

Welcome to the NAGAS Workload and Wellbeing Toolkit

This toolkit has been developed by the National Association of Governance Advisory Services (NAGAS) to help governors, trustees, chairs, clerks, governance professionals and governance leaders make governance more effective, sustainable and manageable.

This resource responds to themes raised through the NAGAS Governance Workload and Wellbeing Survey carried out in Spring 2026. For more information on the survey and results, please follow this link: Governance Workload and Wellbeing Toolkit | NAGAS

Respondents described pressure created by lengthy governance documentation, late information, overloaded agendas, unclear roles, duplicated reporting and emotionally demanding issues.

The message from the survey is clear: governance workload and wellbeing are not separate issues.

Alongside the NAGAS Governance Workload and Wellbeing Survey 2026, NAGAS invited governors, trustees, Chairs, governance professionals and governance leaders to share examples of workload and wellbeing challenges they had experienced, together with the approaches used to address them.

The resulting ***Case Study Snapshots*** reflect common themes raised by contributors, including workload pressures, role clarity, governance capacity, emotional load, board culture and succession planning. They demonstrate how the practical tools within this toolkit can help boards respond to challenges and improve governance effectiveness and sustainability.

All examples are anonymised and reproduced with permission.

When governance systems are unclear or overloaded, people carry unnecessary pressure. When governance is well-designed, people can focus their time and energy where it matters most.

The aim of this toolkit is simple: **effective governance should be clear, focused and manageable.** It should help boards make well- informed decisions, manage risk and strengthen accountability without adding unnecessary work, duplication or complexity.

Key principle: Effective governance is not measured by how much work is done. It is measured by whether the right work is being done well.

What the toolkit aims to help boards do

The toolkit supports boards and governance teams:

- clarify roles and boundaries;
- reduce avoidable workload;
- improve meetings, governance documentation and planning;

- recognise emotional load and risk;
- spot early warning signs of overload; and
- build governance cultures that support retention, recognition and wellbeing.

What the toolkit covers

The toolkit is organised into five collections of practical tools, developed in response to the themes raised through the NAGAS Governance Workload and Wellbeing Survey. Together, they address the most common pressures experienced across governance roles.

1: Clear Roles and Boundaries - clarifying responsibilities and reducing role-drift.

2: Workload and Governance Efficiency - reducing duplication and improving meetings, governance documentation and planning.

3: Emotional Load and Risk - recognising the pressure created by complaints, safeguarding, exclusions, conflict and difficult decisions.

4: Early Warning and Wellbeing Checks - identifying pressure before it becomes a bigger problem.

5: Culture, Recognition and Sustainability - supporting sustainable governance, recognition and retention.

Quick reference

Your Role	Suggested Toolkit Sections
Governors	Tools 1, 2 and 5
Trustees	Tools 1, 2 and 4
Chairs and Vice Chairs	Tools 3, 4 and 5
Governance Professionals and Clerks	Tools 1, 2, 3 and 5
Governance Leaders	Tools 1, 4 and 5

How to use this toolkit

This toolkit is not intended to create another layer of governance work. Boards should use it selectively and practically.

Start with one pressure point. Choose one tool. Test it in practice. Keep what helps, adapt what needs refining and stop what does not add value.

Key message: Those engaged in governance should not have to work harder to make it succeed. Effective governance should make the work easier, clearer and more focused.

1: 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.

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?

2: 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

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:

School name/logo here

FGB Work Programme ....

Autumn 1	Autumn 2	Spring 1	Spring 2	Summer 1	Summer 2
Strategic	**Strategic**	**Strategic**	**Strategic**	**Strategic**	**Strategic**
• Agree SDP • Review of Pupil performance 2025 • Agree Pupil Premium strategy • Sports Grant impact • SFVS planning • Pay Committee TOR and membership • HT Appraisal Committee membership • GB structure, Tof R, monitoring schedule.	• September FMR • Draft 2025/6 budget plan • Ofsted Inspection Data Dashboard • Surrey EYFS data • Safeguarding Audit progress • Progress data capture 1 • Governor monitoring visit reports	• FMR • SFVS approval • Three Year Budget Plan • Buy backs 2026/7 • Admissions Update • Pay Committee minutes • Review of Safeguarding Audit – actions required	• 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 2026/7 • School fund account • Admissions update • SFVS – review of actions required	• SATs – initial outcomes if final meeting early enough (summer 2025) • 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	• Behaviour incident report	• Attendance data	• Behaviour incident report	• Attendance data • H & S annual report	• Behaviour incident report

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.

3: Emotional Load and Risk

Purpose: Some governance responsibilities, such as complaints, exclusions or grievances, can create significant emotional pressure.

This tool helps boards:

- identify emotional pressure;
- share responsibility;
- manage escalation;
- support individuals; and
- reduce avoidable risk.

TOOL 3.1: Stress / Pressure Assessment

Consider a task or activity that may be causing you or the governing body stress or pressure currently. Identify what it is and then use this tool to score in line with the areas below:

Factor	1	2	3	4
Complexity	Low	Moderate	High	Very High
Emotional Intensity	Low	Moderate	High	Very High
Time Requirement	Low	Moderate	High	Very High
External Advice Required	Low	Moderate	High	Very High

- **Complexity:** Low to Very High complexity.
- **Emotional Intensity:** Low = little emotional impact; Very High = severe distress likely.
- **Time Requirement:** Low = minimal time; Very High = extensive time commitment.
- **External Advice Required:** Low = none required; Very High = specialist advice essential.

Results

Score	Rating	Response
4–6	**Low**	Follow standard procedures.
7–10	**Moderate**	Additional oversight required
11–13	**High**	Chair and governance professional review
14 or higher	**Very High**	Specialist advice and enhanced support arrangements

Dependent on your scoring outcome, consider the next tools in order to assess whether further advice or support is needed and for whom.

TOOL 3.2: Emotional Load Risk Assessment (Share the Load)

Ask:

Who is carrying the pressure?
☐ Chair
☐ Governor
☐ Governance Professional/ Clerk
☐ Governance Lead

Is support available?
☐ Yes
☐ No
☐ Don't know (seek advice or refer to Chair / Governance Professional / Clerk for guidance)

Should responsibility be shared / delegated?
☐ Yes
☐ No

Reflect on your responses to the questions above and consider the level of pressure and how to address it using the table below. It is important to remember that no individual should carry the weight of any issue or concern alone. There will always be someone who can support or guide – this may be your Trust, governance support provider or a trusted colleague / peer.

Level	Response
Low	Monitor
Moderate	Share responsibility
High	Formal support
Very High	Escalate and review

Case Study Snapshot

Challenge: A governance professional experienced significant pressure when findings from a governance review were challenged by school leaders.

What helped: Professional boundaries were maintained, evidence-based discussions were used and support was sought through governance networks.

Impact: Reinforced the value of peer support and not carrying difficult situations alone.

Related Toolkit Tool(s): Tool 3.2 Emotional Load Risk Assessment.

TOOL 3.3: Post-Incident Review

To support wellbeing and future processes, it is important to reflect on impact and any lessons learned. Below are some questions to ask and a proposed table which can be used to record actions taken, proposed or intended from the post-incident review:

- What happened?
- What worked well and what created pressure?
- What support was available and should anything change?

Area	Detail
Complaint / Exclusion/Grievance / Other	
Likely Pressure Points	
Available Support	
Escalation Route	
Review Date	

Case Study Snapshot

Challenge: Wellbeing concerns were identified amongst those carrying governance responsibilities.

What helped: Peer support from experienced Chairs, access to a named governance officer and signposting to wellbeing resources.

Impact: Improved wellbeing and increased confidence in managing governance pressures.

Related Toolkit Tool(s): Tool 3.2 Emotional Load Risk Assessment and Tool 3.3 Post-Incident Review.

4: Early Warning and Wellbeing Checks

Purpose: Governance pressures usually develop gradually - early identification of potential red flags allows earlier intervention.

TOOL 4.1: Governance Red Flag Checklist

Score:
Green - Low = 0
Amber - Moderate = 1
Red - High = 2
Yellow – Very High = 3

Indicator	Score
Increasing complaints or other panel activity	
Late governance documentation	
Meeting overruns	
Meetings not quorate for decisions	
Vacancies not filled within a term	
Poor attendance	
Delayed actions	
Board disengagement	
Operational agenda items	
One-person dependency	

Results

Score	Rating	Response
0–5	**Low**	Normal governance activity
6–10	**Moderate**	Monitor and review
11–20	**High**	Action required
21–30	**Very High**	Governance sustainability risk – urgent action required

TOOL 4.2: Five-Minute Governance Pulse Check

As individual board members, score each area statement below and then use the following tool to collate as a whole board, discuss and action:

1 = Strongly Disagree / 5 = Strongly Agree

Area		Score
Workload	My governance workload is manageable	
Role Clarity	I understand my governance responsibilities	
Support	I know where to seek support	
Effectiveness	Governance board time is used effectively	
Culture	Governors' challenge in meetings is respectful and constructive	
Sustainability	I feel able to sustain my governance role	

Area	Average Score
Workload	
Role Clarity	
Support	
Effectiveness	
Culture	
Sustainability	

Interpretation:
4–5: Healthy / **3–4:** Monitor / **Below 3:** Review and discuss

Chair Review Questions: Are any scores declining? Are there recurring themes? Does action need to be taken?

TOOL 4.3: Governance Board Pressure

Purpose: To help governing boards identify governance pressure early and take proportionate action before effectiveness or sustainability is affected currently:

LOW	MODERATE	HIGH	VERY HIGH
Normal governance activity Governance is operating as planned. Workload is manageable, meetings are focused and responsibilities are clear.	Increasing governance pressure Early warning signs are appearing. Agendas, actions or capacity may need prompt review before pressure builds.	Significant governance pressure Governance effectiveness is being affected. Action is needed to share workload, strengthen support and reset priorities.	**Governance sustainability risk** **The board may struggle to operate sustainably without change. Escalation, external support and structural review may be required.**

Read across the four levels below and identify the description that best reflects your governing board today. If most indicators sit within one level, take the action shown.

🟢 **LOW: Healthy Governance**

What it looks like

- Meetings are effective and focused
- Actions are completed on time
- Workload feels manageable
- Roles and responsibilities are clear

Ask Yourself: Are we operating as planned?
Response: Continue current arrangements and maintain oversight

🟠 **MODERATE: Governance Under Pressure - Review**

What it looks like

- Agendas are becoming longer
- Actions are slipping or delayed
- The same people are taking on more work
- Capacity is beginning to feel stretched

Ask Yourself: Are warning signs starting to appear?
Response: Review meeting structure, committee arrangements, workload and priorities

🔴 **HIGH: Significant Governance Pressure - Intervene**

What it looks like

- Attendance is falling
- Key tasks are delayed
- Decisions depend on a small number of individuals
- Governance activity is becoming reactive

Ask Yourself? Is governance effectiveness being affected?
Response: Introduce support, reallocate responsibilities and implement corrective actions

🟡 **CRITICAL: GOVERNANCE SUSTAINABILITY RISK - Escalate**

What it looks like

- Governor vacancies remain unfilled
- Engagement has significantly reduced
- Workload concerns are affecting performance
- Governance arrangements may no longer be sustainable

Ask Yourself? Can the board continue to operate without change?
Response: Seek external support and review governance structures, capacity and succession arrangements.

Discussion Prompt: What is the single most important action we need to take to improve governance effectiveness?

TOOL 4.4: Who is Carrying Too Much?

One-Person Dependency Assessment

Rate each area.

Area	Green	Amber	Red
Chair Dependency	☐	☐	☐
Governance Professional/ Clerk Dependency	☐	☐	☐
Committee Dependency	☐	☐	☐
Link Governor Dependency	☐	☐	☐

Questions:

- Who could share responsibility?
- Is succession planning in place?
- What happens if the individual leaves?
- What action can we take

Example:

Risk - Chair handles all complaints.
Rating - Red
Action - Create panel arrangements and shared oversight.

Case Study Snapshot

Challenge: Monitoring visits and governance responsibilities became concentrated between only two governors because other governors were unable to regularly visit during the school day.

What helped: Responsibilities were reviewed and redistributed where possible.

Impact: The experience highlighted the risks of dependency on a small number of individuals and the impact this can have on wellbeing and sustainability.

Related Toolkit Tool(s): Tool 4.4 Who Is Carrying Too Much? and One-Person Dependency Assessment.

TOOL 4.5: The Governance Health Dashboard

Review Time: Under 10 Minutes

Area	Green	Amber	Red	Priority Action
Workload	☐	☐	☐	
Attendance	☐	☐	☐	
Vacancies	☐	☐	☐	
Governance Documentation	☐	☐	☐	
Meeting Effectiveness	☐	☐	☐	
Complaints	☐	☐	☐	
Capacity	☐	☐	☐	
Succession Planning	☐	☐	☐	

Dashboard Questions

1. What has changed?
2. What requires action?
3. What can be prevented?

Example

Indicator	Status	Priority Action
Attendance	Low	Monitor
Complaints	Moderate	Increase – review policy, procedure and process
Vacancies	High	Longstanding vacancies - recruitment planning

For guidance on next steps for succession planning, please refer to the guidance produced by NAGAS: Succession Breeds Success 2026.

5: Culture, Recognition and Sustainability

Purpose: Effective governance depends on people.

People are more likely to remain involved when expectations are clear, support is available, contributions are recognised and development is encouraged. Regular assessment and recording of culture, induction process and succession planning supports future planning.

TOOL 5.1: Governance Culture Health Check

Score each question:
No = 0
Sometimes = 1
Usually = 2

Question	Score
All members contribute	
Challenge is constructive	
Contributions are recognised	
New members are supported	
Meetings are inclusive	
Communication is effective	
Different views are welcomed	
Governance is respected and valued	

Results

Score	Rating	What does it mean for us?
12–16	Green - Low	Positive governance culture
7–11	Amber - Moderate	Areas for improvement
0–6	Red - High	Culture review recommended

Example:
Total Score = 9
Rating = Amber
Action:

- Improve participation.
- Review induction.
- Strengthen recognition.

Case Study Snapshot

Challenge: During a period of school improvement, governors needed to maintain appropriate challenge while supporting school leaders and each other.
What helped: Ensuring all governors had opportunities to contribute and maintaining focused, respectful discussions.
Impact: Improved governance effectiveness, clearer challenge and a positive governance culture.

Related Toolkit Tool(s): Tool 5.1 Governance Culture Health Check and Tool 5.7 Building Culture Through Governance Practices.

TOOL 5.2: Recognition Matters

Do we:

☐ Thank people for contributions?
☐ Recognise collective achievements?
☐ Celebrate milestones?
☐ Acknowledge volunteer commitment?
☐ Recognise governance professionals / clerks?

Simple Recognition Practices

During Meetings

☐ Thank contributors
☐ Recognise / acknowledge achievements

Annually

☐ Celebrate governance successes
☐ Recognise service and commitment

Informally

☐ Personal messages
☐ Positive feedback

Recognition should be genuine: avoid token gestures that feel artificial

TOOL 5.3: NEW GOVERNOR INDUCTION CHECKLIST

Before First Meeting

☐ Agree who will be responsible for induction
☐ Welcome conversation
☐ Role description
☐ Key governance information
☐ Meeting schedule

First Meeting Checklist

☐ Introductions completed
☐ Mentor identified
☐ Key processes explained
☐ Questions encouraged

First Term Plan:

Month 1 - Induction
Month 2 - Meeting participation
Month 3 - Development discussion

TOOL 5.4: New Governor Engagement Check-In

Ask:
Do you feel able to contribute?
☐Yes ☐ No

Do you understand the board's priorities?
☐ Yes ☐ No

Is your contribution valued?
☐ Yes ☐ No

Do you wish to remain involved?
☐ Yes ☐ No

Participation Review Tool

Review:

- attendance;
- contribution;
- engagement;
- development.

Board Reflection: What helps people remain involved in governance here?

TOOL 5.5: Governance Succession Planning Template

Why Succession Planning Matters

Dependency on one individual creates governance risk - effective governance requires resilience and continuity. Sharing responsibility, spotting talent and encouraging participation all remove barriers governor/trustee willingness to volunteer/step up.

Area	Detail
Key Role	
Current Post Holder	
Potential Successors	
Development Required	
Review Date	

Key Role Risk Assessment

Role	Low	Moderate	High
Chair	☐	☐	☐
Vice Chair	☐	☐	☐
Governance Professional / Clerk	☐	☐	☐
Committee Chair	☐	☐	☐

Handover Checklist:

☐ Key documents identified
☐ Knowledge transferred
☐ Successor briefed
☐ Support available

TOOL 5.6: Are We Sustainable?

Annual Governance Sustainability Review

Is workload reasonable?	☐ Yes ☐ No
Is responsibility distributed fairly?	☐ Yes ☐ No
Is anyone carrying too much responsibility?	☐ Yes ☐ No
Are key roles dependent on one individual?	☐ Yes ☐ No
Are people confident in their roles?	☐ Yes ☐ No

Sustainability Scorecard

Area	Low	Moderate	High
Workload			
Support			
Retention			
Succession			
Development			

Improvement Planning template

Issue	Action	Owner	Review Date

Case Study Snapshot

Challenge: Governance responsibilities became concentrated amongst a small number of volunteers due to vacancies and differing levels of availability.

What helped: Reviewing workload distribution and considering succession and recruitment planning.

Impact: Highlighted the importance of sustainability and reducing reliance on key individuals.

Related Toolkit Tool(s): Tool 5.5 Governance Succession Planning and Tool 5.6 Are We Sustainable

TOOL 5.7: Building Culture Through Governance Practices

Governance Behaviours Framework

Expected Behaviours

- Respect;
- Preparation;
- Constructive challenge;
- Collaboration;
- Accountability.

Unhelpful Behaviours

- Personal criticism;
- Dominance;
- Disengagement;
- Poor preparation.

Meeting Norms

We will:

- listen respectfully;
- focus on evidence;
- challenge ideas, not people;
- encourage participation.

Shared Commitment: We will contribute to a culture that supports effective governance and sustainable participation.

TOOL 5.8 NAGAS Board Workload and Wellbeing Charter

As a board you may wish to adopt the NAGAS Board Wellbeing Charter. The charter brings together the key principles of effective governance, workload management and wellbeing promoted throughout this toolkit. It provides a simple set of commitments that boards can use to strengthen governance culture, support sustainable participation and reduce avoidable workload pressures.

On the next page, we have provided an example that boards may wish to adapt and adopt.

Choose any 6-10 statements that best reflect your board's priorities and agree them collectively at a board meeting.

Tip: Revisit the charter mid-year and celebrate one positive change or wellbeing improvement achieved as a result.

Insert Governing Board name

Workload and Wellbeing Charter

Good governance works best when workload is manageable, people feel supported and responsibilities are shared. These commitments help us work together in a way that is effective, sustainable and respectful of everyone's time.

- We keep meetings focused, useful and on time.
- We keep agendas and papers clear, manageable and easy to prepare for.
- We avoid unnecessary last-minute pressures and allow enough time for people to prepare.
- We make sure everyone knows what has been agreed and who will do what next.
- We focus on the bigger picture and avoid getting involved in day-to-day management.
- We make roles, responsibilities and expectations clear.
- We respect people's time and do not expect replies outside agreed hours.
- We listen to each other, respect different views and challenge constructively.
- We pay attention to the wellbeing of everyone involved in governance.
- We talk about workload and wellbeing before problems become bigger.
- We make sure our Governance Professional or Clerk has the time and support needed to do their role well.
- We say thank you and recognise the contribution people make.
- We create meetings where everyone feels comfortable speaking and contributing.
- We give new governors a warm welcome and the support they need to get started.
- We share responsibilities fairly and avoid relying too much on one person.
- We support learning, development and future governance leaders.

Closing Summary:

The toolkit has been informed by the NAGAS Survey on Workload and Wellbeing, anonymised case study snapshots and wider governance research and guidance, including the following:

Governance Research and Sector Publications

- NGA: Taking stock of governance workload
- NGA: Governance professional perspectives
- NGA: The case for governance
- CST: Next-gen governance
- The three strands of leadership - a joint report through ASCL, ISBL and NGA

Governance Guidance

- DfE Maintained schools: governance guide
- DfE Academy Trusts: governance guide
- Academy Trust Handbook

Additional Sources of Support

The toolkit is intended to complement, not replace, existing governance support arrangements.

Including the resources available through NAGAS, boards may also have access to additional resources such as:

- Regional NAGAS groups
- local authority governor services;
- diocesan boards;
- governance networks;
- academy trust governance services;
- professional associations (for example, ISBL, NAHT, ASCL);
- legal or HR support providers;
- governance training providers.
- National Governance Association (NGA); and
- Confederation of School Trusts (CST)

Access may depend on individual school, trust, diocesan, local authority or organisational memberships and affiliations.

Acknowledgment: This toolkit has been produced by NAGAS for regional members to share with their clerks and governance professionals. It may be used in whole or part by governors, trustees, clerks and governance professionals on the understanding NAGAS is acknowledged as the source. The first edition of this document was compiled in 2026 by a project team comprising Suhaib Saeed (London Borough of Lewisham Governors' Services), Steve Barker (Judicium Education) and Melanie Stokes (Legacy Governance Solutions).

Published: September 2026