

## THE TRUSTEE'S ROLE

Academy trustees are volunteers. The Charity Commission defines trustees as the people responsible for governing a charity and directing how it is managed and run.

In academy trusts, this means:

- **Setting the trust's vision and values, and the strategy for achieving this vision.** The trust's vision will centre on pupil progress and achievement. Working with senior leaders, the board sets strategic objectives to help the trust reach its goals.
- **Holding executive leaders to account for the educational and financial performance of the trust.** The board creates robust accountability for executive leaders through rigorous analysis of performance data and financial information.
- **Ensuring the trust's financial success and probity.** Trustees are responsible for ensuring that the trust operates with regularity, propriety, and value for money, using only the resources it has available.

### Responsibilities

- Develop the trust's vision and strategy
- Establish a culture of high educational standards, which promotes staff and pupil wellbeing
- Monitor provision for pupils with special educational needs (SEN) and disabilities
- Ensure stakeholders (parents, pupils, staff, and the local community) are informed and consulted as appropriate
- Approve the budget for the academy trust, and where relevant, for academies within the trust
- Monitor and evaluate the trust's financial performance
- Approve and review school policies, and hold staff to account for their implementation
- Ensure the trust is compliant with legal requirements, including that all statutory policies and documents are in place
- Carry out the appointment and performance management of the principal/chief executive
- Monitor and evaluate the trust's staffing structure
- Monitor health and safety in the academy/across the trust
- In a multi-academy trust, work with those involved in local academy governance, supporting, and holding them to account

Trustees are also expected to abide by the Nolan Principles of Public Life –

- **Selflessness** Holders of public office should act solely in terms of the public interest. They should not do so in order to gain financial or other benefits for themselves, their family or their friends.
- **Integrity** Holders of public office should not place themselves under any financial or other obligation to outside individuals or organisations that might seek to influence them in the performance of their official duties.

- **Objectivity** In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards and benefits, holders of public office should make choices on merit.
- **Accountability** Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.
- **Openness** Holders of public office should be as open as possible about all the decisions and actions that they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands it.
- **Honesty** Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.
- **Leadership** Holders of public office should promote and support these principles by leadership and example.

### Skills and Experience

Essential:

- Critical listening and the ability to ask effective questions
- Strategic thinking
- Excellent communication
- Problem solving and analysis

Desirable:

- Understanding of data
- Finance and/or accounting knowledge
- HR experience
- Knowledge of education
- Leadership and management
- Risk management
- Legal expertise, particularly knowledge of charity law
- Marketing and communications

### Time Commitment

All trustees must attend at least 6 meetings of the full board per year with the addition of an annual strategy meeting and an Annual General Meeting (AGM). The term of office is 4 years.

Usually, trustees sit on a committee focused on an area they have knowledge of, or are particularly interested in. Committees generally meet up to 3 times a year. Trustees may also be required to take on lead monitoring roles which will involve additional meetings throughout the term.

Preparation for meetings includes reading papers and preparing questions for senior leaders.

You will also be expected to undertake any training required to enable you to discharge your role effectively.

Trustees are also expected to visit schools while they are open to pupils at least 3 times per year.

#### Additional information

Academies are both charities and companies limited by guarantee. Academy trustees are therefore both charity trustees and corporate directors and must comply with company and charity law. This includes the academy registering trustees with Companies House as a director.

#### Key Document

[The Essential Trustee \(Charity Commission\)](#)