

## The Trustees 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 providing:

- **Strategic leadership:** defining a vision, fostering a culture and championing the strategy
- **Accountability and assurance:** providing robust and effective oversight of operations and performance
- **Strategic Engagement:** strategic oversight of relationships with stakeholders

## 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 Trust 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:

- A commitment to the Trust's vision and ethos and the best outcomes for all pupils
- Critical listening and ability to ask effective questions
- Ability to assimilate and assess information and data
- Strategic thinking
- Excellent communication
- Problem-solving and analysis

Desirable – a range of experience is needed across the Board:

- Understanding of data
- Finance and/or accounting knowledge
- HR experience
- Knowledge of education
- Leadership and management skills
- Risk management skills

- Legal expertise, particularly knowledge of charity law
- Marketing and communications skills

### **Time Commitment**

All trustees must attend at least 6 meetings of the 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 link monitoring roles which will involve additional meetings throughout the term.

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

Trustees will also be expected to undertake any training required to enable them to discharge their roles 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 Trust registering trustees with Companies House as a director and on the DfE's Get information about Schools.

*Extracted from the AAT Board and Committee Operating Procedures*

### **Key Documents**

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

[The Academy Trust Governance Guide](#)