

How to: support the recruitment, appointment and retirement of governors and trustees

Governor and trustee retirement checklist

How to use this document

Below is an example checklist of actions to be completed when a governor or trustee leaves a governing board. It is not an exhaustive list and can be adapted for your setting(s).

	Item	Completed
1	Documents to be sent to the governor or trustee:	
	Letter of thanks for their service to the governing board	
2	Communication:	
	School or trust email address disabled	
	Access to school governor or trustee portal disabled	
3	Internal governance records	
	Acknowledge departure with reason in board minutes	
	Update governing board membership record	
4	External notifications	
	Relevant authorities notified that the governor or trustee has left the board such as the local authority, diocese, Companies House (for trustees), etc.	
	GIAS updated with the governor's or trustee's leaving date	
5	Exit interview	
	Exit interview meeting with the chair of governors or trust board arranged to discuss possible areas for improvement to the board, effectiveness of support given to governors or trustees and particularly successful contributions the governor or trustee has made to the board during their time as a member.	
6	Memberships	
	Membership of other relevant organisations updated to remove the governor or trustee (NGA Membersip, NGA Learning Link Governorhub, etc)	
7	School specific information:	
	School website governance information updated to remove the governor or trustee	
	Remove the governor or trustee details from any physical noticeboard display in the school	
8	Return/destruction of documentation	
	Governor or trustee to confirm that all school and governance documentation has been returned or destroyed, as appropriate to the type of documentation	