

Managing the membership of the board

New board member onboarding checklist

How to use this document

Below is an example checklist of actions to be completed when a new governor or trustee joins a governing board. It is not an exhaustive list and will need to be adapted for your setting(s). It has been organised into sections to help clerks and new board members see the wood for the trees. It is suggested that a copy of it should be given to the new governor or trustee so they also can keep track of things and make sure that they have completed the things they need to complete, have access to the sources they need and meet the right people.

1. Onboarding Checklist

	Item	Completed
1	Documents to be sent to/completed by new board members	
	Letter of welcome (and confirmation of appointment if appropriate)	
	Code of conduct for governors or trustees (signed and returned as appropriate)	
	Contact details form (to be completed and returned)	
	Declaration of qualifications and disqualifications to serve as a governor or trustee (to be signed and returned)	
	Conflict of interest form completed and returned	
	List of fellow board members with specific roles	
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2	Constitutional documents to be provided to new board members	
	Schedule of governing board meetings (including committee meetings)	
	Instrument of government/ Articles of Association	
	Governing board committee terms of reference/ scheme of delegation	
	Minutes of the most recent full board meeting and committee meetings	
3	Key school organisation information to be provided to new board member	
	Prospectus or similar	
	Ethos and vision	

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	Item	Completed
	Strategy	
	The curriculum offer	
	Operational plans (e.g. school improvement plan, school development plan, school self-evaluation form (as appropriate))	
	Most recent Ofsted inspection report (and Section 48 report if appropriate)	
	School inspection data summary report for the school	
	Financial information (e.g. 3-5 year budget forecast)	
	School policy access (viz. safeguarding/child protection, equality, GDPR, SEND)	
4	Safeguarding checks¹ to be completed by new board members	
	DBS application completed and returned	
	Section 128 check completed (if necessary)	
	Overseas criminal record check completed (if necessary)	
	Identity and right to work check completed (if necessary)	
5	Training	
	Induction training booked and completed	
	Keeping Children Safe in Education (KCSiE) (declaration to be returned confirming it has been read)	
	Child protection and Prevent training undertaken	
	DfE Academy trust handbook	
	Any current training available e.g. login link for NGA's Learning Link	
	DfE Governance handbook, Competency framework for governance and Clerking competency framework	
	NGA's Welcome to governance/Welcome to a Multi Academy Trust publication provided (for boards with NGA membership)	

¹ The process of applying for a DBS certificate goes through the school, local authority or trust as appropriate. There is no specified requirement for individuals with a governance role or staff members in schools to renew their DBS checks, however, boards should ensure they have a consistent policy on renewing checks that avoids unnecessary repetition

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	Item	Completed
	Information explaining how to organise governance visits to school(s)	
6	Communication arrangements	
	School or trust email address issued	
	Access to school governor/trustee portal	
	Governance professional contact details shared and introduction meeting arranged (as required)	
	Relevant authorities notified of new governor or trustee appointment such as the local authority, diocese, companies house (for trustees), etc.	
	Introduction meeting with chair arranged to discuss focus areas and link roles	
	GIAS updated for new board members (but not academy committee members)	
	Membership of other relevant organisations updated (NGA, Governorhub, etc.)	
7	Other school organisation information to be provided to the new board member	
	School website address	
	Most recent school newsletter	
	School term dates (and dates of school events that governors/trustees are invited to attend) and	
	Staffing structure diagram/list of staff and roles	
	Information on the recent history of the school (if available)	
	Update any noticeboard or website with the name, photo and short biography of new board member	
8	Follow-up actions	
	It is good practice to arrange a follow-up induction meeting after around 6 months with the new governor or trustee	
	Completion of skills audit either in line with the annual skills audit of the full governing board or separately if that has recently been completed	