

Succession planning

Using the succession cycle



Identifying the future opportunity

Chairs, clerks and other governors and trustees have a huge role to play in ensuring that succession planning is something that the board actively talk about; that it features regularly on the agenda – under training and development. This will help create an open culture, where succession is not only talked about, but also practiced by the board.

What does that look like on a governing board?

- The current chair(s) being very open about when they would ideally like to stand down.
- The clerk sharing best practice relating to succession planning on governing boards.
- Under the subject of development – other governors feeling that it is acceptable for them to say that they would like to take on a chairing role at some point.
- Succession planning for all chairing roles is discussed at the governors' vision and strategy day.
- The head teacher supporting the succession planning discussion.

The theory, that sounds easy and painless, but getting the conversation started can be difficult for some boards if the practice is not already in place.

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Using the succession cycle

How can governors get the discussion started?

- Use NGA Preparing your Board for Future guidance as a reason to put succession planning on the agenda.
- If a governor has recently attended training or a CPD event – Use this as a reason to report back to the board on any actions or recommendations related to succession planning.
- Approach an ally – either the clerk, experienced governors or one of the chairs – to ask if they are supportive of having succession planning as an agenda item.

Once the discussion has started, it will become apparent about where the future opportunities will be and when that opportunity will become available.

Talent spotting

Existing governors and trustees should feel able to identify their future development needs and articulate this to the board. This will encourage them to consider the skills required for a chairing role. The NGA Leading Governance chairs development programme is fully funded by the DfE and is ideal for future chairs or those who are interested in developing their knowledge and skills. Chairs have a critical role to play in supporting governors who have the ability but perhaps lack the confidence to step up.

What opportunities to talent spot are available to governing boards?

- Use the skills audit to identify and review individuals' skills and knowledge that may not have been apparent in their governance role.
- When a governor attends a training event, conference or undertakes CPD, the report back to the board should include how their knowledge and skills have developed.
- Taking on a specific task or project for the governing board and delivering a successful outcome.
- Demonstrating leadership skills by chairing a panel or leading a working party.

Boards should not hesitate to look outside the board to recruit new governors if, for whatever reason, the existing governors are unable to commit to taking on a chairing role. This practice is widely accepted in both the corporate and the charity sector and governing boards should learn from the best recruitment practice in other sectors.

Sometimes, members of the wider the school community have skills that the board requires, and should be actively encouraged to apply. To ensure fair and open recruitment, there must be a thorough process and interview, but some people will need that tap on the shoulder.

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Gaining commitment

Effective succession planning depends on honest conversations and governors committing to developing themselves to take on a chairing role. This may take time and consideration – a voluntary role requires commitment and a chairing role will increase that commitment.

We will explore the potential barriers to chairing and overcoming these barriers later in this module.

Identifying the development needs

This is generally achieved by a blend of open discussion in governing board meetings under the agenda of training and development and private one-to-one meetings between the future chair and either the incumbent chair or the future chairs mentor.

Training needs analysis should happen at a governing board level:

“What areas do we need to understand better or refresh our knowledge of?”

Most governing boards have access to governor training – either open courses or in-house sessions and the expectation should be set by the chair that all governors attend the training which meets their needs.

How can I develop my governor knowledge and skills?

Encourage governors to reflect upon their practice and knowledge:

- What are the areas that I do not fully understand?
- Where are the gaps in my knowledge?
- Do I understand the role of the chair?
- Am I confident that my chairing skills are effective?
- What methods can I use to develop knowledge and skills?

What type of quality learning and development does your board have regular access to?

Tick those that your governing board currently use.

- NGA Learning Link – e-learning for governors and trustees.
- Open face-to-face training courses which are delivered locally.
- In-house governor training sessions delivered by experienced and knowledgeable trainers.
- Attendance at national or regional conferences or events.
- Self-led learning, reading and research.
- External mentor or National Leader of Governance (NLG) to develop the governing board.

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Learning and development

Once governors have identified the areas that they need to increase the knowledge in, then the Chair should encourage governors to explore the various development opportunities:

Pick which you are going to commit to find out more about or start to utilise:

- E-learning modules for governors and trustees.
- Face-to-face open courses for governors.
- In-house governor training for the whole board.
- Chairs courses available locally.
- CPD events or conferences.
- Local networks, patch meetings and local cluster groups for governors.
- Allocating time to read the latest guidance and policies.
- Being allocated a mentor – either from within the governing board or a National Leader of Governance (NLG).

Monitor and review learning

Chairs should have one-to-ones with all the governors and trustees on the board as part of their leadership role. This is usually once a year as a minimum but should be more frequent if the school is in challenging circumstances. Meetings between the incumbent chair and the future chair should be frequent enough for the future chair to feel supported, but the meetings must be manageable to both parties.

How can governing boards monitor the knowledge and skills that governors have developed?

These one-to-one meetings are the time for all governors to review their learning and agree any further actions or training required. Governing boards can use our model succession plan and blank plan to document the learning and development, which will be undertaken by the governor.

It can help to encourage governors to reflect on the development opportunity and discuss what they have learnt.