

# A guide to virtual governance

For those governing within schools and academy trusts

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## Contents

<u>1. When should governance be virtual?</u>	<u>4</u>
<u>2. Virtual meetings</u>	<u>5</u>
<u>3. Virtual school visits</u>	<u>7</u>
<u>4. Board recruitment opportunities</u>	<u>8</u>
<u>Appendix</u>	<u>9</u>

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## National Governance Association

The National Governance Association (NGA) is the membership organisation for governors, trustees and clerks of state schools in England.

We are an independent, not-for-profit charity that aims to improve the educational standards and wellbeing of young people by increasing the effectiveness of governing boards and promoting high standards. We are expert leaders in school and trust governance, providing information, advice and guidance, professional development and e-learning.

We represent the views of governors, trustees and clerks at a national level and work closely with, and lobby, UK government and educational bodies.

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## Introduction

COVID-19 restrictions made it essential for governing boards to adopt virtual governance routines and practice to maintain business continuity.

Following this period of change, we encourage all governing boards to evaluate their experiences and engage in meaningful discussion in order to reach a consensus about how they wish to conduct their business in future.

This guide contains advice and guidance for governing boards to support these discussions and to achieve effective virtual governance.

Advice for clerks and governance professionals on the logistics of virtual meetings is included as an [appendix](#) to this guide.

## Terminology

To make this guide easier to read, we have taken the following approach:

- **‘Virtual governance’** is the term used to describe the use of video conferencing technology (Zoom, Microsoft teams etc.) to undertake governing activities that would otherwise be carried out in person.
- We use the phrase **‘governing board’** to cover both the maintained governing body and the academy board of trustees.
- We use the word **‘schools’** to include academies (including free schools).
- We use the word **‘governor’** as shorthand to mean those governing: governors, trustees and members of academy committees.
- We use **‘headteacher’** to describe the lead executive in the school or trust.

# 1. When should governance be virtual?

It is for each board to decide the best format for different types of meetings and interactions to maintain effective governance. This is likely to involve meeting and interacting by virtual means when:

- It is more practical to do so (particularly in the case of short, focused meetings and discussions).
- It helps to maintain continuity of business, avoiding issues and delays caused by availability to meet in person.
- It provides a flexible response to personal circumstances and supports work-life balance. For example: cuts travel time, offers a child-care solution or reduces late nights in school.

Boards will likely decide that meeting face-to-face is the right solution where the interaction helps to:

- Retain the connection with the school or trust by being present more often.
- Build and maintain working relationships by being in the same room.
- Create a better and more personal environment for discussing more complex and challenging matters.

Some individuals will understandably be cautious about a return to face-to-face meetings – we advise boards to evaluate which types of interaction most benefit from being conducted in person. Keeping face-to-face interaction to a minimum (if only for a transition period) may be helpful to those who feel more vulnerable.

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## Effective teamwork

NGA has produced [guidance](#) on board dynamics to support governors and trustees to work effectively as part of a team.

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## 2. Virtual meetings

### 2.1 Chairing virtual meetings

Chairs play a fundamental role in ensuring that virtual meetings are well run. They may need to adapt their approach in order to achieve positive dynamics that support good teamwork.

The key messages for those chairing virtual meetings are:

- Make sure everyone has a chance to speak – directly invite questions where needed.
- Be clear about which agenda point is being covered as the meeting progresses – it might be useful for the chair (and others) to print the agenda so it can be readily referred to.
- Work with your clerk to make sure everyone can access virtual meetings – signpost training and offer support where required.
- Make use of the professional advice and administrative support offered by your clerk or governance professional (such as distributing joining instructions), allowing you to focus on your leadership and strategic responsibilities.

NGA's [Chair's Handbook](#) includes helpful guidance that is pertinent to chairing both virtual and in-person meetings.

### 2.2 Board dynamics

The dynamics change when governance is virtual. Interacting through a screen reduces opportunities for informal interaction and to use body language and non-verbal signals to communicate. Whilst this may lead to shorter, more focused meetings, it also has disadvantages. For example, not 'sensing the room' may undermine confidence in asking an important question or discussing a challenging issue.

Virtual meetings are more effective when those involved in running them give thought to how to create healthy team dynamic where individuals are both supported and challenged to contribute to the best of their ability. Ways of achieving this may include:

- Supporting members of the board who may struggle with the technology.
- Setting time aside at the beginning of meetings (probably without school staff) to replicate the moments normally spent having a coffee and a catch up.
- Deciding if and how chat and hand raising functions might be used to help make the meeting flow more easily and encourage participation.
- Allocating sufficient time on the agenda for discussion and questions.

- Maintaining informal contact, for example through a governance portal, to stay connected with the business and improve the dynamic.

NGA's [example protocol](#) can be adapted and used by governing boards as the formal 'ground rules' for conducting virtual meetings.

## 2.4 Hybrid meetings

Hybrid meetings (where attendance is split between those present in the room and those attending virtually) offer a degree of flexibility and can be a way of maximising attendance by providing governors/trustees – who may have otherwise missed the meeting – an opportunity attend virtually. This meeting format may work better for smaller groups and focused conversations, however, the previous experience, capabilities and dynamic of the group will also be a factor.

When holding hybrid meetings, it is advisable to:

- Practice using the technology, equipment and physical meeting space in a hybrid scenario in advance of the meeting.
- Think about how you will move from one speaker or agenda item to another – you may wish to group agenda items accordingly.
- Ask virtual participants to join the meeting early (if all virtual participants have joined the meeting in advance of in-person participants arriving, any teething problems can be resolved, and the meeting can get started promptly).
- Consider how those present in the room will interact with one another and with virtual attendees – for example, a large screen (rather than individual laptops) for those in the room may support effective interaction.
- Have a back-up in place – most virtual meeting platforms provide a dial-in alternative so that if virtual participants have a problem with their internet connection, they can use a phone line to dial-in to the meeting instead.

### 3. Virtual school visits

School visits are an opportunity for governors and trustees to meet with staff, pupils and other stakeholders to get to know their school and build relationships.

However, there are circumstances where it may be appropriate and more convenient to carry out a virtual visit. This usually involves meeting with a member of staff and/or pupils using video conference and proved a necessary approach during the COVID-19 pandemic.

When planning a schedule of visits, governing boards should be aware that, whilst some areas of focus lend themselves to virtual visits, this does not allow governors and trustees to readily experience school life, culture and ethos first-hand – it is not possible for the board to carry out effective monitoring without regular in-person visits to the school site. This does not mean that **every** governor and trustee must visit regularly, rather the board as a whole should have a regular programme of in-person visits in place.

Virtual visits should be planned in much the same way as in-person visits and might consist of:

- virtual meetings or phone calls with staff
- experiencing school life virtually (perhaps attending events like virtual assemblies)

A schedule of visits (in-person and virtual) should be agreed between the governing board, school leaders and relevant staff. This will help ensure that the timing of visits allows governors/trustees to see relevant activities and is appropriate in light of the workload implications for staff involved.

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#### Learn more about school visits

Our [school visits resources](#) include a comprehensive guide to help governors and trustees make the most of school visits. We also provide a model school visits policy, schedule and report template.

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## 4. Board recruitment opportunities

Virtual governance has created opportunities for boards to [recruit new volunteers](#) from outside of their local area on the basis that they will govern virtually and so travelling time becomes less of a barrier. There are potential benefits and drawbacks of taking this approach. Amongst the benefits are:

- It provides another option if previous attempts to recruit have been unsuccessful.
- Access to candidates with a specific skill set and experiences.
- Opportunities to achieve a more diverse board.

Drawbacks include:

- Limited opportunity for the governor/trustee to build a relationship and rapport with their colleagues on the governing board.
- Limited opportunity for the governor/trustee to visit the school.

We advise governing boards to consider the following before recruiting governors/trustees to govern virtually:

- Can we accommodate a virtual governor(s) and a hybrid approach and still maintain the effectiveness of the governing board?
- How will someone recruited to govern virtually be inducted to the board?
- How is someone recruited to govern virtually (and unable to visit the school regularly) going to experience its culture, values and ethos – is that an issue?

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### NGA induction resources

[Welcome to Governance](#) and [Welcome to a Multi Academy Trust](#) induction guides offer key information to new governors and trustees about their role and how to be effective.

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# Appendix

## Virtual meetings: advice for clerks and governance professionals

**Note: governing boards should have approved their arrangements for participating and voting in virtual meetings using the provision within maintained school governance [procedures regulations](#), academy articles of association and academy committee terms of reference.**

### Adapting the agenda

Some agenda items are quicker when carried out virtually, others take longer – appropriate time should be given for each item. When supporting your governing boards to construct effective virtual meeting agendas, consider the following recommendations:

- Cover the most important topics first.
- Limit meetings to a maximum of 2 hours and include breaks in longer meetings.
- A timed agenda may help everyone to stay on track and engaged (if a topic has not been covered within the given time, it may be better to cover in a subsequent meeting).

### Recording virtual meetings

Video conferencing platforms that are used to hold virtual meetings usually provide an option to record the meeting. NGA advises clerks and governing boards to consider the following before deciding to record a virtual meeting:

- How consent will be obtained from those participating.
- What the school/trust data protection and records retention policies say about video and audio recordings.
- What happens to the recording and how it will be deleted – any recording that refers to named individuals counts as personal data.
- The potential impact on participation and meeting dynamics – knowing that the meeting is being recorded may affect what people say and how they say it.

### Signing minutes

As is normal practice, the minutes of each meeting must be reviewed and confirmed to be an accurate record of the meeting and any decision making. Minutes can be ‘signed’ (ie approved) via email or using any available method of obtaining digital signatures.

Thank you for reading this guide. If you have any feedback you'd like to share, please email [kcfeedback@nga.org.uk](mailto:kcfeedback@nga.org.uk).

## More from NGA

### Knowledge Centre: best practice guidance

NGA members get exclusive online access to best practice school governance guidance from NGA's Knowledge Centre. Go to [NGA's Knowledge Centre](#) and log in to browse and download guidance, templates, model policies, information summaries and more.

### GOLDline: bespoke advice

NGA's [GOLDline advice service](#) provides independent and timely advice to governing boards with GOLD membership. Our advisers guide members through topics including governance roles and responsibilities, admissions, exclusions, complaints, and board constitution.

Find out more about [NGA GOLD membership](#) and sign up.

### Don't miss out on membership benefits

If you're an NGA member, check your account details are correct by logging in at [nga.org.uk](http://nga.org.uk) and visiting the account management page. Every member of your governing board needs an up-to-date account to access benefits including our Governing Matters magazine and weekly e-newsletter. If you don't have an account or you're not sure, talk to your clerk or chair or [contact us](#).

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### Learning Link: e-learning anytime



NGA Learning Link provides cost-effective, comprehensive training for governors, trustees, chairs, and clerks. Learning Link subscribers can access more than 50 engaging modules 24/7.

NGA governing boards can purchase Learning Link at discounted prices. Learn more about [subscribing to Learning Link](#).

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