Robust, Resilient and Ready

Assessing and Strengthening Governance in Charities and Education

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In memory of James Croft (1973-2021)

Introduction

Governance is a topic of existential importance to all charities. A failure in governance can lead to a reduction in service provision; it can reduce the organisation's ability to campaign effectively; or in the case of schools, it can lead to the forced relocation of pupils. In this report, we refer to governance as the way in which the board of trustees or non-executive directors interact with the executive (often through the chief executive or head teacher). It is the arrangement by which power is granted within an organisation. It is how the organisation holds itself accountable to laws and regulations. It is how the strategic plan is developed. Governance sets the tone and culture across an organisation and good governance ensures it is robust, sustainable and does not allow potential crises to fall under the radar.

Charity governance is quite extraordinary in a number of ways. For one, a group of (usually) unpaid part-time individuals are legally responsible for all the big decisions. Eve Poole considers this power dynamic in her essay on school boards while Peter Fanning suggests that unpaid trustees have quite a different frame of reference to paid non-executives in the private sector, and he calls on others in the organisation to acknowledge this when working with them.

Tessé Akpeki introduces the term emotional governance, which she describes as being all about connection and nurturing relationships. A board's capacity to manage emotions, develop empathy and build relationships will determine how it succeeds in strengthening the organisation's performance, she suggests.

The recruitment of charity trustees should be well thought through and targeted. The board needs to know what skills it requires, rather than making up numbers or rewarding someone who has helped the charity in the past. Denise Jagger looks at the recruitment issue, considering induction, tenure and how remuneration might promote diversity.

For boards to best carry out their function, they should be a step removed from the day to day of the organisation and have the space to be strategic. For this reason, bringing in an individual with quite different experience from the executive team can be advantageous. Further, as Neil Watts and Dr Stephen Berryman point out, gaining experience through becoming a trustee or non-executive within your own sector or otherwise can bring a range of benefits for the individual as well as the organisation.

Group structures, specifically groups of schools, create a unique governance challenge. There may be a board for the group as well as each entity within it, and the purpose for each must be clearly defined. Tiffany Beck considers how best to address this and Liz Francis shares Alpha Plus' approach in her essay. Bolstering goverance by improving the supporting role of the school clerk through training and flexibility is discussed by Georgina da Costa.

Lord Clement Jones highlights some of the challenges facing the higher education sector, with a focus on managing risk and demonstrating public contribution.

Charities play such a critical role in our society that they are often subject to challenge or criticism within public and political spheres. Charities must understand and respect their remit and be focused on their beneficiaries. Chris Sherwood argues that governance must be robust so that any criticism or questioning of overstepping boundaries can be answered.

The essays in this report tackle the issue of governance from a range of perspectives, but all attest to the importance of getting it right.

Trust and Governance: New Challenges Ahead for Charities?

Chris Sherwood

One of the biggest surprises in the recent reshuffle was the replacement of Oliver Dowden by Nadine Dorries as Secretary of State for Digital, Culture, Media and Sport. As Ms Dorries has a track record in questioning the role of charities, we can expect her to continue Mr Dowden's scrutiny of the sector and will likely see the culture wars heat up further in the months ahead. Top of the new Secretary of State's in-tray will be appointing the new Chair of the Charity Commission and setting the tone for what charities need to do as they emerge from the vicissitudes of the pandemic.

It is six years since a previous Civil Society Minister told charities to "*get back to their knitting*". Notwithstanding this poor understanding of how charities work, it did ask a much-needed question about the purpose of charities. Are they here to fill gaps left by the state, operate like quasi FTSE100 companies, hold Government to account whilst taking their money, or be the local face of good works?

We can expect the appointment of a new Chair of the Commission to focus the debate again on the purpose of charities, no doubt amplified by certain sections of the media. As we emerge from the Covid-19 pandemic this debate is more vital than ever. But it will not be the only debate. Charities, along with the rest of society, have been through three major systemic challenges in the past decade which have hit many of our beneficiaries hard: the credit crunch, Brexit and the pandemic. New challenges are emerging including the climate crisis and the impact of an increasingly ageing population. Throughout the pandemic, charities showed a nimbleness in changing fundraising and operating models while meeting the growing need for their support, but big questions still remain on how we prepare for the next crisis. The RSPCA, like most other charities, carried on doing what they were set up to do under conditions that were unparalleled in recent history. In our case this is investigating and prosecuting cruelty and rescuing and caring for animals, a role the State to date continues to be quite comfortable with us undertaking, despite it being carried out by central and local Government in other countries. And as we emerge from the pandemic, the debate about what charities are for is more vital than ever.

The media has a powerful role to play here. In recent months, we have seen some areas of the media question and undermine the role of charities to further their own agenda. Allegations of '*wokery*' have been thrown at charities who have spoken up on cultural issues in a bid to undermine the legitimacy of the charity sector in these important national conversations. In the animal welfare sector, for example, we have seen the issue of animal sentience misrepresented as an opportunity for '*bleeding heart*' charities to hold up policy and progress, suggesting that charities will have the power to bring the wheels of Government to a halt, which is simply not true. All this erodes the crucial role charities have to play in society. We take issue with these attacks - speaking up for the voiceless is central to what charities do, it is what we were set up to do and it is entirely legitimate. Whether that is re-examining the historic legacies of those involved in the slave trade, or, in our case, speaking out against huge suffering caused by hunting with dogs. When the media labels this as over-stepping or politicising our role as charities, it reduces public trust and understanding of what we are trying to achieve.

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But while the line where State ends and charity begins continues to be blurred, expect a new focus on what charities do and why they were set up, underpinned by a theme that charities are being used by "*a vocal minority*" to intervene in areas outside their remit, whether these be the removal of statues or, as the RSPCA found, campaigning against the use of dogs to hunt wild animals. We stood firm on this as it is a core issue of our remit to improve animal welfare. Charities should not be afraid to take issue with such attacks.

However, it is important that charities do not wander off into areas outside their remit and this is where governance and the role of trustees are crucial. Five years ago, the tragic death of Olive Cook reminded the charity sector that they had to keep altruism and ethical working central to their minds when they were searching for funding or they risked losing the trust of the public as well as donations. Two Select Committees and a change in the law later and the worst of those data-sharing excesses have been thankfully confined to history. But new challenges have emerged. Changes in communication, especially social media, for example, has brought charities much closer to the public, allowing direct,

'real time' communication. This has great benefits but also creates an expectation that people will get answers to their concerns in minutes, not days. It also creates a climate where unsubstantiated allegations get the same attention as valid concerns. The public is increasingly questioning and often sceptical, creating a challenging climate in which charities have to perform their jobs.

The RSPCA has had its fair share of negative headlines. Recently we underwent a parliamentary enquiry and were in effect in 'special measures' with the Charity Commission as they looked into how we operated. While this scrutiny has been at times painful, it has given us the impetus to change and reform our governance - no small feat given that before our significant reforms in 2019, we last changed our governance in 1974. As an organisation that is two and a half years shy of its 200th birthday, we, like RNLI also set up in the same year, continue to perform a job that governments have never done, whether it is to save animals from cruelty or to save lives at sea. That is a difficult responsibility but one we take very seriously. Getting the balance right as to when to give advice to change a person's behaviour towards their pet or taking away that pet and taking them to court, should not be underestimated.

Governance is important not only because your governance body sets the tone and culture for the organisation (modern governance means a modern charity) but because many charities such as the RSPCA are now essentially social businesses turning over hundreds of millions of pounds with all the resultant responsibilities. It is vital that you have the right people with the right skills to make those complicated decisions.

When I became chief executive three years ago I inherited an organisation performing one of the most difficult jobs for a charity in the 21st century, enforcing legislation on how people look after their pets in lieu of the state, under the framework of a Victorian governance structure. Overhauling our governance was top of my in-tray of priorities. Three years later, the RSPCA has undergone the biggest shake up of our governance structure for two generations. We finally have a governance structure fit for purpose in the 21st century. Governance is important not only because your governance body sets the tone and culture for the organisation (modern governance means a modern charity) but because many charities such as the RSPCA are now essentially social enterprises turning over hundreds of millions of pounds with all the resultant responsibilities. It is vital that you have the right people with the right skills to make those complicated decisions.

I agree with the previous Secretary of State that charities lose touch with their clear purpose at their peril. Trust in charities is vital and especially for charities such as the RSPCA which receives no state funding and is reliant on hundreds of thousands of individual supporters to fund our vital work. I also agree that charities need to be on a financially sustainable footing. We have seen in the past five years what happens when a charity forgets this under a failing governance structure. I inherited a substantial deficit when I joined the RSPCA but am proud that the RSPCA is tackling the challenges it faces head on and is making significant progress in its modernisation and renewal which will provide a strong foundation through to our 200th anniversary and beyond.

So expect a regulator operating from a larger pulpit and a new Chair intent on making their mark. More than ever, charities need to shout about the excellent work they undertake, but ensure they do so from a vantage point where their own house is in order and where they have processes, especially on governance, which can hold firm against any criticism.

The Distinctive Nature of Charity Governance

Eve Poole

In many schools, the Board is treated a bit like a recalcitrant Latin department: the people involved talk a different language and seem to be from another world, but it's important we humour them in order to impress parents and the inspectors. Sometimes the governors don't help themselves much, being used to commercial boards where the role of a NED is largely to pick holes in everything under the guise of quality control or risk management. In a school environment this feels like the worst kind of double-marking, where your head of department tells you you've got it all wrong and everyone should really have been given a C minus. This means that board meetings are either dreaded, or considered an irrelevant waste of everybody's time.

I've been involved in charity boards both north and south of the border for many years. Recently in Scotland I've chaired the Gordonstoun board, and in England I've piloted through legislation to reform the governance of England's cathedrals, for the first time bringing them under the regulatory ambit of the Charity Commission. Those experiences and conversations have given me a new appreciation of the genius of charity governance, as well as the huge challenges inherent in the model. It is this essence that offers the most hope for the proper governance of both charities more generally, and school boards in particular.

The distinctive nature of charity governance is that the trustees are the legal owners of the organisation. While it is customary to delegate day-to-day operations, the buck really does stop with the board and not the executive. Being clear about this is the fastest way to cut through the usual turf wars about who does what, and what should properly be on a board agenda or not. Essentially, everything that the executive does is at the behest of the board, and not the other way round. Heresy I know, culturally, but the law, in fact. A good statement of delegated authority makes this logic clear, and not only sets out the standard financial controls, but explains the agreed exceptions to business as usual that must be signed off or notified to the board. This is not about pandering to those trustees who like to meddle, it is about a sophisticated and adult conversation about the aims of the charity and about the kinds of things that are risks to its health.

In a sector where charity status is under constant attack, unless school boards take their role as a charity board seriously, this status will be so evidently just about finance that there will be no political case to retain it. It is easy to meet charity 'tests' while missing the entire point about the very distinctive style of governance that sets a charity apart. Trustees are there to protect the charity and, unlike a commercial board, are to be primarily guided by its charitable objects and not its ability to generate short-term profits. This should naturally generate a long-term horizon, which is designed to contextualise all the termly operational panic and to cast it in a timeframe that is more about generations than terms or quarters. So, as well as worrying about contracts and policies, a school board should constantly be looking back at themselves from the generations of the future to check that they are handing the charity on in good shape and still true to its core purpose. This perspective allows an evolved statement of delegations that protects the board's right to intervene on any matter that risks its essence as a charity, and a good chair will work closely with their board and the executive to keep this balance healthy.

> *Trustees are there to protect the charity and, unlike a commercial board, are to be primarily guided by its charitable objects and not its ability to generate short-term profits.*

Schools are fond of portraits. There is one of me now, hanging in the North Room at Gordonstoun, with all the other Chairmen and Principals that the school has known. That room represents generations of teamwork, where these careful boundaries between governance and management have constantly been renegotiated, for us all to be able to feel proud of the future we have created for the school. As I walk past those portraits, I reflect on what they bequeathed to us, and what we must therefore be sure to bequeath to those who follow. That is why being a charity trustee is such a challenge and a joy. Beyond all the routines of commercial governance that must also be well deployed, there is the intentional opportunity contained in charity governance to create legacy and to make history.

Portrait of Eve Poole by Rosalie Watkins, now hanging at Gordonstoun.

In The End It's Always About People

Peter Fanning

In this article I offer some personal reflections on how those involved in the governance of charities might relate to their fellow governors or trustees and senior staff. It is helpful to constantly reflect on others' frames of reference as well as your own. Or more prosaically, ask yourself what matters to them and what matters to you and remember the superficial and obvious may not always be what determines peoples' behaviour at key moments. This recognition is essential when decisions are made that affect the lives of others. My personal observations here draw on my experience as a trustee and volunteer in both large and small charities and as a CEO of a major charitable group. I have learnt that understanding the perspectives and motivations of others often leads to the best outcomes, especially when working alongside an unpaid board.

For context, the Charity Commission reports that in 2021 there were 170,000 charities in the UK, with 945,000 trustees and nearly 6,000,000 volunteers. Under 5% of these charities had income over £1 million and under 0.8% had income over £10 million. It's a big population and it's wise to ask what do charities have in common and where are they different?

A large charity with many staff will be different in many ways from a small charity with no staff. Likewise, charities which depend on donations and legacies (27% of those with an income over £500,000) will have very distinct challenges to charities whose income depends on charitable activities (41%). A charity that raises funds from the public will have different concerns to a charity that depends on grants or a small number of very large donations. The 56 or so charities (the super majors) with annual income greater than £100 million operate in a different world to the rest. And so on.

A common feature of all UK charities is that their governors – the trustees – are volunteers and they 'turn up' because they choose to, not because they are paid to (with very few exceptions). And in this regard, trustees share a common frame of reference in that they can generally walk away if they wish to without economic loss to them. People doing a similar job in the governance of public or commercial organisations are usually paid and will suffer economic loss if they 'walk away'. While it is easy to overstate this difference between trustees governing charities and non-executives elsewhere, I think it changes their relative frame of reference and in my experience leaders of charities would do well to keep this in mind.

It would be prudent for the leadership of charities to invest more time in building relationships with their trustees, and where appropriate volunteers, than might be the case in other sectors. Despite initial discomfort, I learned to appreciate the importance of fellowship and the fellowship events and ancillary activities that bind people together to a common purpose.

Those who govern voluntary and charitable organisations have complex and diverse motivations. The NCVO's Almanac 2020 reports that the top five sub sectors of charities are Social Services (19%), Culture and Recreation (14%), Religion (9%), Grant Making (7%) and Parent Teacher Associations (7%). The immediate concerns of those governing Parent Teacher Associations are likely to be very different from those running Social Service charities.

The message here for CEOs and chairs of charities is that it is wise to ask why trustees turn up and contribute to the charity or voluntary body that they help to govern. What is their frame of reference – especially when trustees are making difficult decisions? In my experience, the unspoken emotional drives need more weighting than in commerce or the public sector.

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The following aphorism from a former colleague sums things up admirably - 'It's their hobby, but it is our job!' Cynical and bitter perhaps, but it pithily summarises the very different frames of reference between trustees and paid staff (including of course between Chair and CEO). The frames of reference are different, but one is not better or superior to the other. I would venture to suggest that the success of a charity is related to the ability of trustees and staff, its chair and CEO to navigate between each other's frame of reference. It's about people and their relationships and behaviours.

Emotional Governance

Tessé Akpeki FCG

Covid-19 continues to disrupt the way boards need to govern effectively, efficiently and relevantly. Leaders are continuing to redefine how they lead in a changing environment and culture. This piece focuses on the emotional aspect of board governance which spotlights culture, behaviours, wellbeing and resilience. Governance will never be the same, and high performance now is about being human-centred, dealing with agility and uncertainty, and being comfortable with a lack of certainty in areas of innovation and creativity.

High performing boards look at relationships in a particular way and take responsibility for improving them. When recruiting new board members, they define what behaviours and values matter to the organisation and how new members could support a culture that sustains and enriches the organisation. These leaders are open to challenge, advancement, innovation and change. They allow themselves to make mistakes and learn from them. They are vulnerable and embrace a 'we' rather than 'I' spirit. A board's capacity to manage emotions, develop empathy and build relationships will determine how it succeeds in strengthening its performance.

Boards should consider:

- What behaviours are ingrained in the organisation? What behaviours are acceptable? What attitudes are unacceptable?
- What does the board need to start doing differently? What do board members need to do less (or more of)? The board will need to embrace the discipline and commitment to make the right adjustments.
- What recommendations should be included for moving forward and making advances?
- What is the culture of the organisation? What is unique about the board?
- What is the quality of the relationship between management and governance?
- Is there trust, confidence and competence? Is there appropriate boundary management?

The approach for emotional governance involves:

- *Fostering a culture of accountability.*
- *Making things clear* – clarity of expectations and of the roles of board and staff.
- *Setting goals* – tracking performance against the agenda, evaluating progress, spelling out accountabilities, being specific about what needs to be done to evaluate progress and align with its strategy.
- *Certainty and consistency* – in an uncertain environment increasing the chances of success. Consistently seeing what can be done, even if it means doing things incrementally.
- *Cooperation, collaboration, compassion and connection* – the board and staff feel empowered, engaged and are part of the decision-making process. Utilising compassion and accountability, the board ensures people feel they belong, and are cared for and connected at all levels of the organisation.
- *Confidence* – the board is engaged and feels it can explore choices, be in control and make effective and informed decisions.
- *Curating board content* – pulling together what is relevant for the board. This includes information, stories, articles, blogs from different sources, the content from board retreats and visioning days.
- *Communication* – board members feel they have a voice and that their voice is heard. They share opinions, show empathy, feel a sense of belonging and connection and have robust, courageous and honest conversations. The board is inclusive, supportive and aware of the importance of valuing and using a diverse range of talents, insights, knowledge and wisdom.
- *Continuous improvement* - able to celebrate success, without becoming complacent. Creating and maintaining a culture of learning and continuous improvement is a must.
- *Adopting new behaviours* – exploring how the board can meet expectations more successfully by adopting and adapting new behaviours while holding on to behaviours that have an impact. Such a board marks milestones while recognising and affirming outstanding work.
- *Share experiences of experimentation* - what has worked and what has not gone so well. What are the levels of transparency, confidence and trust? How is the board rebounding from mistakes and failure?
- *Collegiality is key* - move forward together. Regular check-ins help to build psychological safety and ensure that no one is left behind or feels unsupported.

- *Use crisis or chaos as launching pads for brilliance*. The board continually enhances its capacity to resolve tricky and sticky issues should they emerge and utilise board members who are courageous and will not back off at the first sign of problems.

The emotional board is all about connection and nurturing relationships, and this can also apply on digital platforms such as Facebook, Instagram, Twitter and Pinterest. Never before has social media presented such powerful tools to connect with others and to raise awareness of what a charity does. Board members could mention their membership on their LinkedIn profile, the website could show board member profiles with their pictures. Photographs of organisational activities could appear on the website. Storytelling and story sharing are underestimated currencies. We only need to look at the inspiration of Captain Tom to see how people crave positive and uplifting experiences. As well as engaging with the wider community, LinkedIn and Twitter can keep board members informed and connected, as can a viable and alive WhatsApp group.

> *The emotional board is all about connection and nurturing relationships, and this can also apply on digital platforms*

When these components are built into a Code of Conduct, they become the way business is done at every level of the organisation. The Chair fulfils a strategic role in facilitating board bonding and decision making. Board members, staff and volunteers as members of a team, play different and complementary roles, feel affirmed, included and nurtured. Contributions and expectations are clear. Internal systems are effective and efficient. Encouragement keeps things going even when things get challenging.

Recruiting Charity Trustees and Specialist Advisers

Denise Jagger

It is often thought that because charity trustees are unremunerated that somehow the work is less rewarding and it is all part of 'giving back'. In turn some charities, especially smaller ones, are immensely grateful for the expertise which is freely given and so feel unable to move trustees on either by regular rotation or by direct action if they are weak or irregular contributors.

I would like to dispel the first myth and to contend that the way in which charity trustees are recruited, engaged, assessed and then rotated off a board is as important as the recruitment of a paid independent, non executive director.

For the larger, well-resourced charities and HE institutions (HEIs) it is certainly worth engaging one of the search firms specialising in charities and/or your sector, particularly if a specific skill set is required. All charities and HEIs should prepare, and regularly update, a skills matrix. This needs regular review as the work and demands of the charity develop and regulation and governance practices emerge. For example on one board we have recently appointed a trustee lead for safeguarding as the charity has started to assist much younger clients.

For those without a budget there are free sources available online which do require more input from the charity but can increasingly yield good results. Similarly, it is prudent to use the networks and organisations of both the independent trustees and the executive team and where appropriate to encourage applications from selected individuals who match the required skills set. However, any potential conflicts must be disclosed and the identified individuals subject to a transparent and rigorous interview and selection process.

Occasionally a charity needs quite specialist advice and yet there isn't room on the board to add new members to provide this. This can be solved by identifying a specialist. On one of my boards we have had an experienced commercial lawyer sense check responses to a major contract review and, separately, an employment lawyer to act as a sounding board for the HR lead.

In each case it was important to establish that the purpose was not to provide free legal advice, but to act as an independent sounding board and reviewer. In the same way HEIs and other charities may appoint an independent specialist to their Remuneration Committee or more regularly to their Audit Committee who is not a member of the main governing body but who brings specialist skills. Where this does occur, particularly in Audit and Risk Committees, it is essential that, as with all trustees, they receive a comprehensive induction preferably before appointment and that they are kept appraised of events and information which will enable them to properly perform their duties. Quite often these independent members of committees go on to become full board members/trustees when either their time allows or a vacancy arises.

Upon appointment it can also be helpful to allocate a 'buddy' to new members particularly to a first time trustee to help them integrate.

Another route to engaging interested individuals, particularly where they are high profile and influential, is to use the role of patron. This can be for a fixed amount of time or, as in the case of one charity I chair, for a limited period such as the duration of an anniversary year. In this way it is possible to attract individuals who are in high demand and might not otherwise make a commitment. Slightly different to a patron is an ambassador who again can be appointed for a specific period, campaign or activity.

However, it is very easy for busy patrons to lose touch and equally for a charity to simply add their name to the letterhead and thereafter fail to engage. Eventually this could lead to an uncomfortable situation if a charity would prefer that a certain individual steps down or worse, there is a reputational risk attached to them remaining associated.

This brings me to the question of tenure. I have heard of a number of charities where someone has been a valuable and committed trustee, even chair, but they eventually start to outlive their usefulness but because of their past contribution the charity feels unable to act. For precisely this reason it is important to have sensible rules around terms of appointment and re-appointment. Guidance varies between the Charity Commission and other corporate governance codes and bodies and to an extent it depends upon the nature of the activity, how specialised it is, the ease of recruitment and the frequency of meetings. The most important thing is to have some rules and a process for reviewing a trustee or board member's contribution. Whilst some individuals may want to stay for the long term, ironically an overly long or open-ended term could be a deterrent, particularly to a trustee who is still active in their executive life. In addition to the formal review and evaluation process, the Chair should have periodic conversations with each trustee to seek and offer feedback and guidance and to ascertain their intentions and any training or development needs.

Finally, a word on the remuneration of trustees. In the vast majority of charities the roles will be unremunerated - quite rightly in my view. However, one particular area of diversity some institutions lack is the voice and experience of the younger generation. Clearly this will be more relevant for some sectors such as HEIs, than others but I would be disappointed to discover that a talented individual in the early stages of their career could not take up an appointment due to either the salary foregone or the holiday lost in attending meetings. It is very easy to assume that they can simply make the time if sufficiently committed, forgetting that as a junior employee or self employed entrepreneur their attendance would involve a far greater personal and financial commitment than that required from a senior business person or retiree. For the same reason, reasonable travel costs should be paid where this would place a particular burden on a trustee. Alternatively subcommittee meetings or occasional trustee meetings could be held virtually to ease any cost and/or travel burden.

> *Whilst some individuals may want to stay for the long term, ironically an overly long or open-ended term could be a deterrent, particularly to a Trustee who is still active in their executive life.*

Thinking as a Trust

Tiffany Beck

The education landscape has transformed dramatically since the passing of the Academies Act in 2010. Prior to that, there were just 203 academies, all of them secondary schools.

Fast forward to 2021. According to the Department for Education's data published 9th September 2021[1], there were 9,639 open academies, part of 2,586 school trusts, educating nearly 4.6 million pupils. Academies account for 43% of state schools and educate 55% of state school pupils, and those numbers continue to grow.

Clearly academies are not just some subcategory within the system, increasingly they are the system – that's not about politics or ideology, that's about the statistics and logistics.

As the sector has grown, so too has the understanding of school trusts as educational charities with a single legal and moral purpose: to advance education for public benefit. School trusts are overseen by a voluntary Board of Trustees who hold strict duties under both charity and company law. Trustees are holders of public office and are required to uphold the Nolan Principles of Public Life.

The responsibility and liability on the shoulders of these volunteers is immense. School trusts are accountable to Education and Skills Funding Agency, the Department for Education, Ofsted and, through the Accounting Officer (generally the CEO), directly to Parliament. Rigorous external audits are undertaken annually, with the full reports published on trust websites.

What does that responsibility and liability look like on paper? As a Chair of Trustees myself, I'll use my board as an example. We are responsible for 13 primary schools in London and the South East, which means we must ensure the education of 4200 pupils; the training, development and career fulfilment of 680 staff; the health and safety of nearly £96m of estates; and the strong financial management of £30 million of public funding.

1 https://www.gov.uk/government/publications/open-academies-and-academy-projects-in-development

All of that must be done through ever-changing Ofsted frameworks, government policies, education ministers and even global pandemics. Truly, this is no small feat, regardless of the size of the organisation.

To make the biggest impact and ensure delivery of what needs to be delivered, within all the requirements of the accountability system, the board must think differently than any legacy mindset of a single school, or group of schools. It must think as a single organisation, always thinking about organisational design, building capacity in advance of need and leveraging the advantages a trust structure affords to maximise benefit for the children. To make all that possible, the organisation itself must be healthy and truly function through a positive, collaborative culture that fosters every opportunity for success. So if you are in a trust, yes, there are many questions to be asked around education data and finance.

> *To make the biggest impact and ensure delivery of what needs to be delivered, within all the requirements of the accountability system, the board must think differently than any legacy mindset of a single school, or group of schools.*

But also, what does the big picture look like for your trust? Some questions to consider:

- How does your structure create better professional development opportunities for staff? How does that improve retention? How does that improve the school experience?
- How does collaboration actually work, and how does that impact on continuous school improvement and improving the life chances for all children?
- How does the trust make a difference to children's aspirations?
- How is the SEND expertise from one school disseminated and adapted in the other schools?
- Do potential parents know their child's learning and experience will benefit from the expertise held throughout the trust if they choose one of your schools?
- Do potential staff know there are a variety of career pathways available to them if they apply to one of your posts?

- Why do current staff stay in the trust?
- Do other schools have a good understanding of what it means to be part of your trust? Is this communicated any way?
- What would growth actually do – would it bring further educational capacity? Facilitate expertise? The funds to develop a key area of support for all your schools, such as finance or IT? What is the mutual benefit that increases benefit for all the children?
- Do key decision makers and policy influencers know what areas of specialist expertise are held by your trust if they need to draw on advice or support?
- Are the trust's relationships with those decision makers and policy influencers strong?
- Are there financial efficiencies to be had, allowing for limited public funding to be reallocated towards where it would be most impactful for the children?
- What does your trust actually mean when it talks about collaboration?
- What does good support in any service look like?
- What works across school contexts – and what has to be adapted to every single one?
- Where has alignment happened organically? Where has it been forced – and why?
- What actually gets children excited to come to school, staff to come to work and governance volunteers to take on the accountability?
- Are we reaching out to potential partners to secure more and more opportunities for our children?
- How do we make the trust system work for our children in our schools?
- Are we just waiting for things to be told to us? Or are we working as system leaders to shape the system we are in?

Ultimately, for me, I am always wanting to know: what exactly is possible at school, trust and system levels? And are we using the trust dividend and the organisation we have very carefully built, to do better things, rather than just doing the same old things better? That is truly one of the key features of governing in a school trust – the opportunity to do better things.

Harnessing the Power of the Group

Liz Francis

Alpha Plus Group is one of the largest private school providers in London and the UK. Each of our 20 schools, colleges and nurseries have their own distinctive approach and ethos but with the same overarching goal of providing a Gold Standard education to each student in our care. We are committed to learning from the best and that includes applying the findings of national and international education research, as well as disseminating the best practice in our schools. The collective range of expertise that can be drawn upon across the group includes, inter alia, Early Years, supporting children with SEND, digital literacy, EAL, study skills in the Sixth Form, leadership, marketing, Finance, IT, HR and property.

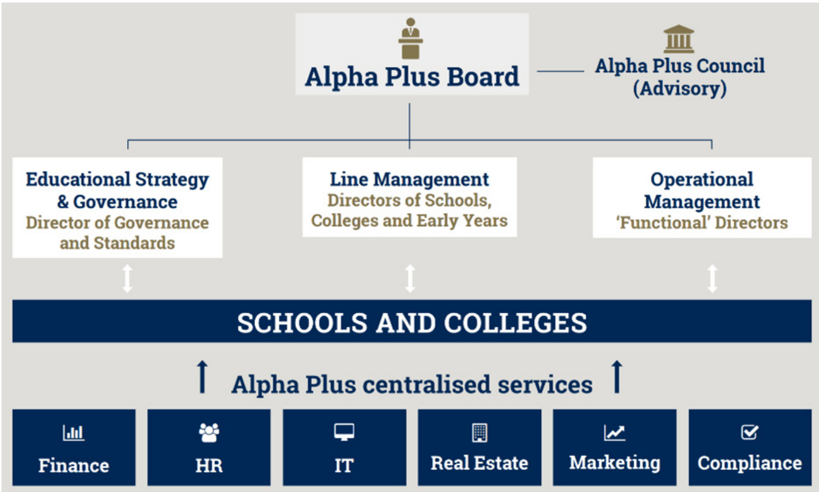
As the Group's Director of Governance and Standards one of my responsibilities is to oversee the governance arrangements for all 20 schools. This includes visiting each school on a termly basis and, using a set of quality criteria based on inspection frameworks, providing support and challenge. The first visit in the autumn term focuses on the academic achievements of the year, well-being and safeguarding. The spring term visit focuses on the quality of teaching and the summer term visit focuses on a review of the year and plans for the coming academic year. Schools also have an annual strategy meeting with the CEO and governors, as well as financial governance meetings. Our role, as governors, is to question - why is that done, where is the evidence behind it, what is the impact? It is about drawing out - how do we know, what are the benefits of this initiative?

The governance process also supports the dissemination of best practice. Of course, as governors, our school visits are not constrained by the termly meetings. Each head is line managed by one of four governors who provide on-going mentoring and coaching. Our strength lies in the fact that all our education governors are experts in their field. Similarly, our Marketing, HR, IT, Finance and Property Directors are experts. Providing central support for these functional areas means that heads can concentrate on the day to day running of the school, as well as achieving their strategic goals.

To govern comes from the Greek word 'kybernan', meaning 'to steer'.

This demonstrates our approach in helping to set strategic direction. Where our model of governance differs from others is our operational support for the functional areas such as finance. The phrase, 'eyes on, hands off' is commonly used to describe school governance. In plainer words, don't get involved in the detail of the day-to-day running of the school. However, at APG we do both - strategy and operations. Our directors of Property, Marketing, HR, IT and Education are 'hands on' and accessible.

Our governance structure is set out here:



The sharing of best practice reaches far beyond the governance visits. Each school has access to our centralised portal and Education Hub where they can access policies for safeguarding/SEND, resources, lesson examples, 'how to' tech videos, newsletters and publications. We also offer a vast forum schedule which is vital in connecting our staff across the group, from the UK to New York, and promotes collaboration and knowledge sharing. Forums cover individual subjects, leadership courses, head consultations, SEND, well-being, data and CPD. Our Annual Conference for the heads and their senior leadership teams is a brilliant opportunity for all the schools to network. Here, schools offer lessons learnt, their methods and share general ideas/resources. The Innovation awards are also distributed, the accolade designed to support and reward creativity and innovation, whilst also providing ideas that can be shared with schools. Due to the innovation and new thinking needed to successfully operate in the last academic year of the pandemic, a new category, 'The New Normal' was implemented. Winners receive a monetary prize which is matched to a charity of their choosing. Other categories include Teaching and Learning, Digital Literacy and Welfare and Pastoral.

Our values and culture also underpin everything we do. As one of our heads said: 'In academic, pastoral and administrative terms, we are part of a powerful shared network of understanding and best practice'. Our schools are also committed to fundraising for a range of charities. Despite continuing challenges presented by the pandemic, fundraising and community activities continued to enrich the lives of our schools. For the year ended 31st August 2021, the Alpha Plus family of schools and parents raised an amazing £586,115 for charities and bursarial support.

Effective governance is just one aspect of a successful school and for APG, a successful group of schools. Our approach is to support and empower our heads to provide strong leadership, knowing we are there to support and advise.

Ingredients for Good Higher Education Governance

Lord Clement-Jones CBE

Chairing a higher education institution is a continual learning process. Governance needs to be fit for purpose in terms of setting and adhering to a strategy for sustainable growth with a clear set of key strategic objectives and doing it by reference to a set of core values. Behaviour and a culture which reflects those values are as important as governance processes.

The current context is much more difficult than when I chaired the School of Pharmacy from 2008, when HEFCE was the regulator or even when I chaired UCL's audit committee from 2012. The OfS is a different animal altogether and despite the assurance of autonomy in the Higher Education Act, it feels a more highly regulated and more prescribed environment than ever.

I was a Company Secretary of a FTSE 100 company for many years so I have some standard of comparison with the corporate sector. Current university governance, I believe, in addition to the strategic aspect, has two crucial overarching challenges.

First, particularly in the face of what some have described as the culture war, there is the crucial importance of making, and being able to demonstrate, public contribution through – for example – showing that:

- We have widened access
- We are a crucial component of social mobility, diversity and inclusion and enabling life chances
- We provide value for money
- We provide not just an excellent student experience but social capital and a pathway to employment as well
- In relation to FE, we are complementary and not just the privileged sibling
- We are making a contribution to post-COVID recovery in many different ways, and contributed to the 'COVID effort' through our expertise and voluntary activity in particular
- We make a strong community contribution especially with our local schools

- Our partnerships in research and research output make a significant difference.

All this of course needs to be much broader than simply the metrics in the Research Excellence and Knowledge Exchange Frameworks or the National Student Survey.

The second important challenge is managing risk in respect of the many issues that are thrown at us for example:

- Funding: Post pandemic funding, subject mix issues - arts funding in particular. The impact of overseas student recruitment dropping. National Security and Investment Act requirements reducing partnership opportunities. Loss of London weighting. Possible fee reduction following Augar Report recommendations
- The implications of action on climate change
- USS pension issues
- Student welfare issues such as mental health and digital exclusion
- Issues related to the Prevent programme
- Ethical Investment in general, Fossil Fuels in particular
- And, of course, freedom of speech issues brought to the fore by the recent Queen's Speech.

This is not exhaustive as colleagues involved in higher education will testify. There is correspondingly a new emphasis on enhanced communication in both areas.

In a heavily regulated sector there is clearly a formal requirement for good governance in our institutions and processes and I think it's true to say, without being complacent, Covid lockdowns have tested these and shown that they are largely fit for purpose and able to respond in an agile way. We ourselves at Queen Mary, when going virtual, instituted a greater frequency of meetings and regular financial gateways to ensure the Council was fully on top of the changing risks. We will all, I know, want to take some of the innovations forward in new hybrid processes where they can be shown to contribute to engagement and inclusion.

But Covid has also demonstrated how important informal links are in terms of understanding perspectives and sharing ideas. Relationships are crucial and can't be built and developed in formal meetings alone. This is particularly the case with student relations. More generally, it is clear that informal preparatory briefings for members can be of great benefit before key decisions are made in a formal meeting.

The expertise and perceptions of external members have a strong part to play in the student employability agenda. The relationships they build within the academic community, and with constructive engagement, are an essential part of informal governance.

So going forward what is and should be the state of university governance? There will clearly be the need for continued agility and there will be no let-up in the need to change and adapt to new challenges. KPI's are an important governance discipline but we will need to review the relevance of KPIs at regular intervals. We will need to engage with an ever wider group of stakeholders: local, national and global. All of our 'civic university' credentials may need refreshing.

The culture will continue to be set by VCs to a large extent, but a frank and open 'no surprises' approach can be promoted as part of the institution's culture. VCs have become much more accountable than in the past. Fixed terms and 360 appraisals are increasingly the norm.

> *We will need to engage with an ever wider group of stakeholders: local, national and global.*

The student role in co-creation of courses and the educational experience is ever more crucial. The quality of that experience is core to the mission of HE institutions, so developing a creative approach to the rather anomalous separate responsibilities of senate and council is needed.

Diversity on the Council in every sense is fundamental so that there are different perspectives and constructive challenge to the leadership. 1-2-1s with all council members on a regular basis to gain feedback and talk about their contribution and aspirations are important. At council meetings we need to hear from not just the VC, but the whole senior executive team and heads of school: distributed leadership is crucial.

Given these challenges, how do we attract the best council members? Should we pay external members? Committee chairs perhaps could receive attendance allowance type payments. But I would prefer it if members can be recruited who continue to want to serve out of a sense of mission.

This will very much depend on how the mission and values are shared and communicated. So we come back to strategic focus, and the central role of governance in delivering it!

We Need to Get Out More...

Neil Watts

November 2004 – Northgate High School's third successive outstanding Ofsted inspection outcome – and I had already been a headteacher of two large comprehensive schools for sixteen years. I was representing County colleagues and their schools on numerous external bodies and was being actively encouraged to 'take over' other schools, indeed to move school. "Education, education, education" was not only the government's mantra, but it was also my life, and then…..my wife read an advertisement in the Times for a Council Member of the Advertising Standards Authority - the self-regulatory organisation of the advertising body industry in the UK. "You have always been interested in advertising", she said, "how about applying? They are looking for someone with current educational experience".

Well, the best time to visit a chair of governors, and ask for a favour, is following an outstanding Ofsted inspection, and the deal? If I got the very part-time ASA Council role, I would give up my external educational work and 'just' run the school, which had at that time 1700 pupils including 600 in the Sixth Form. To everybody's surprise – certainly mine – I got the job, and I became on Friday nights via the PC in my study, and once a month in London, one of twelve good men and women who would rule whether a consumer complaint against a particular advert broke the ASA code and in consequence the advert being removed from circulation. There was nobody else from a professional education background on the Council, but representatives from a wide variety of backgrounds - the law, the church, the media, the charitable sector, the advertising industry, and the level of debate really tested one's intellectual mettle. You never knew which way people were going to argue on a particular point – a refreshing change from many discussions in education circles. I was actively encouraged to test out some of the 'problematic' adverts on my Year 10 classes – I was the only Citizenship teacher at my school – even the staff room showed a keen interest.

I realised that the skills we learn in education senior leadership are not only transferable but also valuable in the big wide world, and many people just don't really understand schools and young people and are so grateful if somebody can help them. I felt refreshed in my day to day role; it energised my senior team, most of whom took on additional responsibility on my occasional days of absence. It made me realise that we, in education, 'need to get out more'. No wonder so many people in the outside world don't understand us – we can be a pretty insular bunch. From being jaded as a head, I carried on for another five years, another outstanding Ofsted, and then –when the time came to retire from full time headship at the age of 57 – I developed a new career as a 'headteacher without portfolio' and a 'regulator'. Combined perhaps perfectly as a founding member of the board of Ofqual in 2010, and many other roles subsequently – from advertising and press regulation to finance, architecture, housing and of course some roles in education, from primary to university level.

We in education are often very keen to get people from industry, commerce and voluntary organisations into our schools, bringing the outside world in, and we – as senior educational leaders, have so much to offer in return. On a personal level it improves and enriches you in so many ways, and keeps you fresh for the 'day job'. It encourages you to delegate, you are still there if things go wrong, and have something different that links you and your school to the wider world. It is also great fun, and helps people to understand our schools and realise that school leaders are quite normal people really and carry an impressive range of skills. Perhaps most importantly of all, standards at my school rose; we as a profession 'need to get out more', and not just into each other's schools!

It is also great fun, and helps people to understand our schools and realise that school leaders are quite normal people really and carry an impressive range of skills.

Dispelling Clerking Stereotypes Encouraging Diversity Equity and Inclusion

Georgina de Costa

The room was quiet as the Chair of Governors addressed the board regarding the latest budget proposal.

The details and approvals were all carefully noted and documented by the person sitting quietly in the back of the meeting.

The unsung hero. The Clerk to the Governing Board. The person who would take decisions from the governors, give it to the school team, and follow up to ensure that they were enacted. The governors' support network, their critical friend.

Traditionally, a Clerk has been seen as someone sat at the back, a minute taker, on the fringes of the school system who took a few hours every month to come to school, minute meetings and prepare documents. They may have been retired with extra time on their hands or simply may have lived locally and wanted to help the community. Training was elusive and many clerks learned their skills on the job.

Many school leadership teams have learned the value of a good clerk. A good clerk provides constitutional advice, notifies the board of upcoming changes, runs elections, takes registers, sets agendas, supports panels, issues compliance reminders, takes part in governance reviews, analyses audits, listens and documents and much more. Clerks are the hidden roots that help keep the tree of governance thriving.

But the story I hear time and time again from schools across the country is how their clerk has retired after serving for 20 years and they can't find a replacement. In fact, the interim report published last year by the National Association of School and College Clerks (NASCC) has found the overwhelming majority of clerks are aged between 40 and 70 years, with 50% of clerks surveyed being between 50 to 69-years-old. This aging workforce has led to a shortage of clerks across the country. This dilemma forces our hand to look at clerking with a fresh perspective which can be coupled with a goal of making the sector more diverse, equal, and inclusive. By dispelling stereotypes and ideas of what a clerk should be or do, we have opened the door to governance professionals who can become supportive, active members of the Governing Body, providing insight, organisation, and ongoing assistance.

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A prime example of this is working mothers, or those returning from maternity leave. Theresa, 53 recently joined our Judicium's clerking team after 12 years of parental leave. "I was a solicitor before having my son, but I took time off to raise him", Theresa explained. "Once he reached secondary school I had more free time. I sat on a panel hearing school admissions appeals, so I decided I wanted to do something in the education sector. Clerking seemed like a good fit."

Theresa wanted to re-join the workforce, but not in the capacity of her former career as a solicitor. She was also looking for a role that was part time, utilised her previous skills and allowed for a healthy work/life balance. Theresa has found clerking at Judicium to be a perfect fit for her transferable skills and knowledge base. She now supports a number of MATs, academies and maintained schools.

"In my previous role I was used to taking notes at meetings and court hearings and that experience transferred well to clerking. Although there is evening work, I can fit other requirements around my schedule so the flexibility it offers is very attractive."

Theresa is one of thousands of people across the country who have decided to make a career change and are looking for new opportunities. The Department of Education published an analysis on teacher supply, retention and mobility in 2016 which found there were 350,000 qualified teachers not teaching. With experience in schools, an understanding of governance, an interest in education and with sufficient training, these individuals are prime candidates to recruit into clerking.

However, to capitalise on the various benefits clerking has to offer, those in the education sector must create a more inclusive environment to foster growth.

There are three primary areas of focus to bring about change and diversity:

1. *Embrace virtual operations to broaden the scope of qualified individuals*

With the pandemic came an abundance of new regulations, guidance and measures which has largely progressed virtual operations to the forefront of modern governing of schools. Virtual meetings via Zoom or Microsoft Teams have become the norm, replacing the in person sessions that were the staple of the governing body's diary. Hosting meetings online allows for experienced and qualified clerks who may not live locally to take on a position to support a school's governance.

Since the pandemic, over 40% of our clients have opted to solely utilise virtual means for clerking meetings. We are also finding Governors, who give their free time to serve the school, are incredibly receptive to virtual meetings as it cuts down on travel time and subsequent costs. The NASCC found that of those clerks surveyed, 37% travelled more than 10 miles per meeting to fulfil their duties. Virtual meetings mean clerks are able to get the minutes out quicker, as they have saved time on the travel and can begin the write straight away. It also means they have more time to designate to the organisation of papers and their storage.

It is important to note that being restricted by a given geographical area or region can create problems, especially for rural schools that struggle to find qualified clerks and governors to fulfil their needs. Virtual hosting opens the doors to many untapped resources and personnel.

2. Foster Flexibility

Prior to the pandemic, governance meetings were limited to times when 12 or so people could all be in the same room together at the same time. With the adoption of virtual meetings, those restrictions become less burdensome. Opportunities to potentially hold meetings during lunch hours, at the start of workdays or pre-evenings allow for more flexibility for clerks and governors alike, but also for teachers, who no longer have to wait around in school until 6pm for meetings to begin.

This flexibility may also entice more people to consider taking on such positions, if they know there is room for flexibility to work around childcare commitments.

The NASCC report also found 15% of clerks work more than 35 hours per week, while the majority of those surveyed worked in the range of 16-30 hours weekly. When those hours are limited to 6:00-8:00pm, the number of schools a single clerk can cover diminishes rapidly. Opening up alternative time options allows for increased capacity of clerking professionals.

3. Provide training and professional development

It is no secret that many clerks 'fell' into the role with little to no previous training. This shortfall was addressed by the Department of Education in April 2017 with the introduction of the Clerking Competency Framework and the NGA's Development for Clerks Programme. Despite its existence, many governors are completely unaware of the framework and programme, which is designed to provide training and a template to which clerks can evaluate and assess their work. The programme is offered nationally, but the NASCC still found only a third of respondents had taken up the programme and a further 27.5% of clerks have no specific qualifications for clerking. Training is fundamental to creating governance professionals and distancing clerking from the stereotype of ad-hoc administration.

The 2013 School Governance Regulations (Regulation 11) states: "Boards should set demanding standards for the service they expect from their clerk and assure themselves that they are employing a clerk with suitable skills and training." Despite its reference in regulation, there are no specific qualifications required for clerking, so it is often left to the school or governing body's discretion as to the level of training provided to the clerk or that which is obtained prior to their hiring.

Which is why Judicium and NGA have created a bespoke training programme for all of our clerks, because clerks deserve to be recognised for their hard work and support. Anyone joining Judicium as a 'clerk' will have that job title until they have successfully completed the Judicium/NGA Level 2 training course regardless of any previous experience. Their job title will then change to Judicium Governance Professional.

We believe that the more time and training invested in your clerk will produce improvements in results and retainment as they will have a vested interest in the role. Training also puts the clerk in a better position to support governors to challenge individuals when necessary and manage bias within boards.

To conclude, by focusing on these three areas of change, clerking will become a much more diverse, inclusive and balanced field. Clerking is a profession in its own right, with a myriad of benefits to those who have a solid foundation of organisational skills to build upon. It is a field open to the young and the young at heart, to men and women, and to those of any background, religion or culture.

Educators on Board: Embracing the Role of Governor and Trustee as an Educator

Dr Steven Berryman

The typical trajectory for a school-based educator is to progressively move through roles that include increasing management and leadership activities: you might be leading a team, leading a subject and eventually leading whole-school initiatives. With our increase in management and leadership activities we typically lose increasing amounts of our classroom activities. To be a headteacher you will likely have progressed gradually through roles that gave you ever growing leadership scope. We would assume that headteachers, as strategic leaders for a whole setting, would be best placed to be governors or trustees of such settings (and others): I would agree, their experience of strategy makes them ideal. Interestingly the dispositions to be a trustee and a governor do not require a specific role; they require ways of thinking that can be cultivated through a range of roles as well as a reciprocal relationship where governance and trusteeship can help prepare you for future strategic roles.

As a middle leader I saw governance as a way of enhancing my development towards strategic roles in schools. Whilst we lead a subject, it can be challenging (due to the structures and processes of schools) to be involved in whole-school strategic work. I bravely applied for a governance role in a local comprehensive (a very different setting to my own) and was struck immediately by the operational and strategic divide. We worked as governing body to ensure we held the school leadership to account, through supportive challenge, and this took a great deal of conversation with the Chair and the rest of the board to ensure we held ourselves to account and avoided operational concerns. This was important learning for me, and was particularly relevant to my employment where I was leading larger teams and larger scale projects that required a detachment from the operations to keep higher-level concerns at the front of my thinking.

Educators bring vital experience to a range of boards not only governing bodies of educational settings. I sought out opportunities to join charity boards that resonated with my interests and subject expertise; I was successful in joining music organisations that were keen to add educational expertise to their boards as they all delivered learning and participation projects in and beyond their communities. Seeing a range of Chairs in action, from governing bodies to charity boards, is hugely beneficial to help cultivate your own approach to chairing. I saw Chairs that were able to steer meetings with aplomb, keeping to time, ensuring everyone was heard and conflict or challenge were resolved (or at least acknowledged and added to a future agenda). Additionally you experience less effective approaches, and I was able to think deeply about my own approach. The NGA Development for Chairs programme gave me the necessary support to refine my approach and I took opportunities to practice by chairing committees and task/finish groups. Seeing good Chairs that encouraged feedback (about the meeting and their approach) encouraged me to do the same, and checking in with the boards and committees I chaired helped build good committee relationships.

You learn how to consolidate and share large amounts of information, how to present this to enable leaders to make the best decisions and how to ensure you keep the longer-term, strategic priorities at the front of your work.

As a governor and trustee the learning is vast. You are reading a large number of papers (some criticise the volume but I welcomed the opportunity to immerse myself into the workings of the organisations) and come prepared to contribute. Having been in so many meetings, and read so many papers, you gain an insight into what makes effective papers, how you can support those who receive your papers to interpret them (well) and how they can lead to purposeful meetings. This learning can apply to a range of your activities as an educator, whether this is a department meeting or a board meeting with senior leaders. You learn how to consolidate and share large amounts of information, how to present this to enable leaders to make the best decisions and how to ensure you keep the longer-term, strategic priorities at the front of your work.

About the Authors

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Tiffany Beck is Head of Education at PLMR, specialising in strategy, reputation management, change management, PR and stakeholder management. Alongside her work at PLMR, Tiffany is Chair of Trustees at Maritime Academy Trust; using her in depth understanding of challenges facing schools and trusts around the country to provide strategic leadership and governance. Tiffany also advises on boards around the country, leading one to win the National Governance Association's Outstanding Governance Award in 2017, and is a member of Sir David Carter's team for Ambition Institute, conducting diagnostics of how school trusts are developing across the country.

Dr Steven Berryman is Director of Arts, Culture and Community for the Odyssey Trust for Education and a Visiting Research Fellow at King's College London. He has a wide educational experience including teaching, research, professional development, governance and assessment. Steven is a Chartered Teacher, and a Fellow of the Royal Society of Arts, Chartered College of Teaching and Chartered Institute of Educational Assessors.

Lord Clement-Jones CBE was Chair of the House of Lords Select Committee on Artificial Intelligence (2017-18) and is Co-Chair of the All-Party Parliamentary Group on Artificial Intelligence. He is Deputy Chair of the APPG on China and Vice Chair of the APPGs on Digital Regulation, The Future of Work, Music, Performers Alliance, Publishing, Writers and Intellectual Property. Lord Clement-Jones is Chair of Council Queen Mary University London. He was made CBE for political services in 1988 and a life peer in 1998. He is now the Liberal Democrat Digital spokesperson in the Lords.

Georgina de Costa joined Judicium Education in 2017. Here, she quickly became a relationship manager specialising in supporting Multi Academy Trusts and Independent schools with their compliances needs. Georgina is herself a governor at a local community school and has been featured in several well-known industry publications, including The Headteacher, ISBA, ISBL, and SBS.

Peter Fanning is the chair of the Advisory Board of the School of Business and Management at Queen Mary University of London. He has served as trustee and board member of The Coalfields Regeneration Trust and is a former committee member of Hyde Housing Association. He currently advises the chief executive of the Royal School of Church Music and in 2019 retired as Chief Executive of the Chartered Institute of Taxation (CIOT), which he joined in 2008. Prior to CIOT Peter's executive career included Chief Executive/2nd Permanent Secretary, Office of Government Commerce, founding Director of London's Centre of Procurement Excellence and over twelve years with the NatWest Group.

Liz Francis is Director of Standards and Governance at Alpha Plus Group. She started her career in education as a teacher. She has also worked for a number of government agencies, including the Qualifications and Curriculum Authority and the Training and Development Agency for schools. She has been a senior education adviser for Suffolk County Council and an Ofsted inspector. Prior to joining Alpha Plus Group, Liz worked at the Department for Education where she was a policy adviser on school leadership and departmental performance reporting. She holds a PGCE and Masters degree in Education.

Denise Jagger is a former Company Secretary and General Counsel, executive board member and law firm partner. She now holds a portfolio of non executive appointments across private and public companies and the charity sector including Chair of Council and Pro Chancellor at the University of York, Chair of St Giles Trust and a Trustee of the National Trust.

Eve Poole was the first female Chair of the Board of Governors at Gordonstoun School between 2015-2021, a role that complimented her interest in female leadership and the ways that women can be encouraged to take on senior leadership roles. Prior to this, Eve served as Director of Ashbridge Executive Education for 15 years; lecturing and researching on leadership and learning across both the MBA and tailored executive education programmes. Eve has recently stepped down as the Third Church Estates Commissioner, managing the investments of the Church of England within this role.

Chris Sherwood joined the RSPCA as Chief Executive in 2018 following more than 15 years of experience in the charity sector. In his role at the RSPCA, Chris continues to contribute and shape the debate around how to maintain vital services that meet the needs of both animals and those who care for them. Alongside this, Chris is also a Board Member for the World Federation for Animals, which seeks to fill policy discussion gaps by advocating for animals at the United Nations.

Neil Watts was a secondary headteacher in Suffolk schools for 21 years and has worked in both advertising regulation at the ASA and press regulation at IPSO. He was a founder member of the Board of Ofqual, served as a lay member on the Architects Registration Board, as the Citizen Advocate on the Advisory Board of Cifas, and is currently on the Board of Saffron Housing Trust. He sits on the Council of the Alpha Plus Group, on the Foundation Board of the University of Suffolk and was awarded an honorary doctorate in 2016.

Amy Wevill manages executive and non-executive searches, leads on roundtables and events and heads Wild Research, the publishing and advisory division of Wild Search. Amy has a background in international research and programming high-level events, most recently at Chatham House (The Royal Institute of International Affairs). Amy has a Public Policy MA from King's College London and a History of Art BA from University College London. Amy has served as trustee of The Mill and supports young people with reading and writing through The Literacy Pirates.

Edward Wild established Wild Search in 2010 following his earlier career in executive search with two established businesses. He has advised a wide range of education organisations and charities since 2004 on appointments and strategic planning. Prior to that he was the Development Director of Hampton School and author of its history. Edward's early career was pursued in education as a teacher within day schools and national and international charities as both a volunteer and a fundraising specialist. A trustee of a range of educational charities since 2003, he is currently a trustee of the Royal School of Church Music.

About Wild Search

Wild Search is an established, well-connected and innovative executive search and advisory company, specialising in education. Our team provides extensive sector knowledge and brings a formidable and constantly evolving network of contacts to every search.

With over a decade of experience, our market knowledge, network and the Wild Search community are constantly evolving through a combination of searches, reports and events. Our work has encompassed advising on the appointment of executive and non-executive appointments for a range of organisations, primarily in the education and charity sectors. We have also worked with boards to develop new roles and secured shortlists
for them.

We are firmly committed to providing strong methodology, a rigorous approach, thorough research, imaginative thinking, in addition to clear and candid advice. We combine transparency with a sharp focus on the key requirements for each client for every position.

www.wildsearch.org

About Wild Research

Wild Research was formed in 2011 and has since published 31 reports. The majority of the reports focus on education, but others relate to charities, housing and development and the rural economy. In order to further our understanding of our clients' needs and outlook, we seek to evolve and improve our knowledge of the issues they face and challenges that lie ahead.

By contacting and interviewing experts and practitioners in each field, we aim to improve our insight, share best practice and provide new perspectives.

Wild Research welcomes ideas for reports and commissions from clients to highlight new developments and challenges within a business or sector.

Wild Search
-SINCE 2010-

In memory of James Croft (1973-2021)

This publication is dedicated to the memory of James Croft. James was an entrepreneur, strategist and advisor on regulatory and public policy. He founded and chaired the Centre for Education Economics, was editor of Education Investor, and cofounded the strategy consultancy Whitebeam Strategy. James died in May 2021, and is warmly remembered by his friends and colleagues in the education sector, for which he was a passionate and insightful advocate.

About Partners

WHITEBEAM

Whitebeam is a strategy consultancy focused on education and technology, founded in 2020 by James Croft and Matthew Dixon. www.whitebeamstrategy.com

JUDICIUM & EDUCATION we take care of it

supporting education

Judicium is part of Supporting Education Group and was founded 20 years ago by legal specialists with a mission to improve quality and affordability for the education sector. They combine deep legal expertise with a simple affordable annual fee and a practical approach. They are always up to date on legal requirements and challenges for schools and other educational settings. Supporting over 1,700 schools and academy trusts, their proactive approach prevents and minimises issues. www.judiciumeducation.co.uk

A Selection of Wild Research Publications

What Makes A Good Teacher? (2021)
ISBN: 978-1-8382757-1-6

Advancing Autism: Working Together for Improved Outcomes (2020)
ISBN: 978-1-8382757-0-9

Charting a New Chapter: How to Establish and Maintain a Portfolio Career (2020)

Exporting Educational Excellence: British Schools Overseas (2020)
ISBN: 978-1-9998729-1-5

A Sum Greater than its Part: Making Education Groups Work (2019)
ISBN: 978- 1-9998729-8-4

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