

Academy Trust Governance Guide

Summary and guidance for trust boards

March 2024

The Department for Education (DfE) Governance Guides were published in March 2024 to replace the Governance Handbook and serve as the primary DfE source of governance information.

Importantly, the new guides **do not include any new governance expectations**. However, the trust guide is structured around the DfE's [Trust Quality Descriptions](#), and now better aligns with the [Academy Trust Handbook](#).

The role of the [Academy Trust Governance Guide](#) is to:

- distinguish between governance in academy trusts and maintained schools (with separate guides for each)
- summarise and clarify the board's role in relation to legislative and contractual requirements
- provide a clear and concise statement of governance best practice in trusts
- enable stakeholders and the sector to take more ownership of best practice over time

Who should read the guide?

Boards need to balance the importance of making trustees, local governors, executives and governance professionals aware of the content of the guide with the workload implications of expecting volunteers to read a document cover-to-cover.

We expect that, as a minimum, the Academy Trust Governance Guide is read in full by:

- the trust board [chair](#) and [vice chair](#)
- committee chairs, including [local tier chairs](#)
- all trust governance professionals – [trust governance manager](#) and [local tier clerks](#)
- the [accounting officer \(CEO\)](#) and the other members of the central leadership team
- all academy headteachers

All of those governing in trusts – both trustees and local governors – should be made aware of the guide during their [induction](#) and be confident referring to it when needed.

What's in the guide?

Chapter	Refer to this when:	For more information
1. Culture and engagement	<ul style="list-style-type: none"> Defining expected standards of behaviour from those governing Publishing board information Engaging with stakeholders 	<ul style="list-style-type: none"> Code of Conduct What Schools Should Publish Engaging with Parents Engaging with Staff
2. Governance of the academy trust	<ul style="list-style-type: none"> Filling vacancies on your trust board and committees 	<ul style="list-style-type: none"> Recruiting governors and trustees
3. Strategy	<ul style="list-style-type: none"> Setting and refining a strategy for the trust 	<ul style="list-style-type: none"> Being Strategic for MATs
4. Non-executive Leadership	<ul style="list-style-type: none"> Defining governance roles Understanding the role of members Agreeing the scheme of delegation Considering the role of your local tier 	<ul style="list-style-type: none"> Role descriptions The Role of Members Schemes of Delegation The Role of the Local Tier
5. Executive leadership	<ul style="list-style-type: none"> Appointing executives Managing executives Executive pay 	<ul style="list-style-type: none"> Central Leadership Teams What trust boards and CEOs should expect from each other Executive pay
6. Accountability	<ul style="list-style-type: none"> Holding leaders to account Monitoring and managing risks Conducting financial oversight 	<ul style="list-style-type: none"> Executive Leader Appraisal Risk Management in MATs Financial Oversight in MATs
7. Compliance	<ul style="list-style-type: none"> Seeking a summary of the board's key duties and responsibilities Looking for a list of additional resources to understand particular expectations in more depth 	<ul style="list-style-type: none"> Compliance and legislation in trusts Academy Trust Handbook Articles of Association
8. Statutory Policies for Trusts	<ul style="list-style-type: none"> Understanding the policies your trust must have in place, and regularly review. 	<ul style="list-style-type: none"> Policies and procedures Policy review schedule

Key changes

The guide is much more concise throughout when compared to the Governance Handbook, but retains much of the same information and best practice advice. Notable changes include:

- **Separate guides** are now available for trusts and maintained schools, reflecting the divergence of the two school systems. The trust guide is explicitly structured around the fifth ‘pillar’ of the DfE’s [trust quality descriptions](#): governance and leadership.
- **The Governance Competency Framework and Governance Structures and Roles guidance have been archived.** NGA has a wealth of alternative resources, including [role descriptions](#) and our [career pathway for governance professionals](#).
- **The DfE’s list of statutory policies has now been incorporated into the guides.** Procedural and ‘live documents’ have been removed from the list, meaning that it now provides a concise summary of key policies. The DfE has prompted boards to consider delegating policy approval where possible and clarified their position on policy review cycles.
- **Reference to ‘diocesan strategy’** has been added. This is a publicly available summary of a diocese’s approach to academisation and trust governance, first mentioned in the recently updated [Church of England model articles](#) and memorandum of understanding.
- **References to the core functions of governance have been removed**, and replaced by the new definition of the purpose of trust governance, as defined in the [Academy Trust Handbook](#):
 - strategic leadership
 - accountability and assurance
 - strategic engagement
- **Local governing boards are now referred to as local committees**, reflecting the fact that they are committees of the trust board. There is also a clearer statement of the value that the local tier can add to trust governance.
- **An error in the previous handbook has been corrected.** The definition of LAAPs has been amended to reflect the fact that only local authority members still qualify as LAAPs for four years after leaving office – other individuals cease to qualify immediately after leaving the relevant role.