



## GOVERNOR LINK ROLE PROFILE

FINANCE & RISK

RGB

# THE ROLE OF A LINK GOVERNOR

The role of governors in providing support and challenge to senior leaders is more important now than it ever has been. Schools are currently facing a great deal of uncertainty and their success in navigating through this period depends on strong and informed leadership.

## **As a link governor you will be required to:**

- Make pre-arranged visits/calls to the school, with a clear focus. Guidance for how to arrange, complete and completing a visit form is available [here](#).
- Keep the governing board informed about your link area(s), and act as a link between governors and staff
- Support and challenge the member of staff who is responsible for your link area(s). To prepare for this, refer to resources such as 'The Key' or ask the Headteacher for questions to ask. You may need to read applicable school policies which will be available on their website.
- Develop knowledge in their specialist area and take part in relevant training
- Make sure the school has relevant policies in place
- Monitor the implementation of the school's strategy in your link area using information such as school data, outcomes, questioning staff and pupils etc.

## **Work closely with the relevant member of staff**

Set up regular meetings with the relevant staff member so you can monitor what the school's doing. These may include activities such as learning walks and meetings with students and staff.

## **Be the link to the board**

Your job is to act as the link between governors and staff, and to report to the board on things like:

- Subject/provision delivery
- How the subject/provision links to the school improvement plan (SIP) and contributes to pupils' learning
- Progress and challenges facing the subject/provision
- The impact of the subject/provision on pupils
- Upcoming relevant information such as activities, focus days, important deadlines, workshops etc.

## **How to monitor the subject/provision**

We recommend you either meet your link staff member, or visit your school, at least **once a term, three times per year**. Establish a focus for each meeting or visit - these should be linked to any priorities on the schools 'SIP'. If your link area(s) are not on the SIP, work with school leaders to decide a focus for the visit based on their action plans.

## **What you should focus on**

- Plans to improve the subject/provision
- The quality of delivery and impact for pupils
- Subject/provision uptake or student interaction
- Pupil and parent engagement
- Teacher/staff member workload and development

## **Ways to monitor**

- Regular meetings with the relevant staff member(s)
- Visits to the school to see subject/provision in action
- Talking to pupils, parents and staff (or doing a survey)
- Reports from the relevant staff member(s)

# ROLE PROFILE

## FINANCE & RISK

### RGB

#### DUTIES & RESPONSIBILITIES

One of the three key responsibilities of Governance, as defined by the DFE, is for Governors to 'oversee the financial performance of the organisation and making sure its money is well spent.' As the Finance & Risk link Governor, it is your role to take the lead on this and assist the Chair in ensuring that the Governing body are fulfilling this obligation.

Risk is inherent in everything academy trusts do to deliver high quality services. Risk management should be an essential part of governance and leadership and an integral part of business planning and decision-making processes.

The Finance & Risk link governor will:

- Serve on the Finance and Staffing Sub-Committee (FASC) and where possible act as the Chair of the FASC reporting back to the full on RGB on key risks and information
- Work with the Executive Business Manager, Headteachers and DoEs to ensure the schools budget is sustainable, money is well spent and is in line with the Trust strategy and school improvement plan
- Be the voice at RGB meetings who considers financial implications in initiatives, changes and news
- Be the voice at RGB meetings who ensures relevant risks are identified and understood, and that appropriate mitigations are planned and monitored
- Attend annual November & May Hub finance review with Deputy CEO, Director of Education, Head of Finance and Executive Business Manager
- Act as a critical friend to the Headteacher & Executive Business Manager, providing advice, challenge and support' in all areas including:
  - School budget setting.
  - Financial monitoring and forecasting.
  - School workforce planning.
  - Best value for money.
  - Benchmarking.
  - School improvement plan.
  - Income generation.
  - Capital expenditure.
  - Future financial risks or threats.
  - Procurement.
  - Operating and maintaining a risk register.
  - Management of risks including contingency and business continuity planning.
- Establish frequency of expected communication and updates from the Executive Business Manager, ensuring this is in line with their standard reporting procedures as not to add additional workload.

# RESOURCES

## TRAINING RESOURCES

[Video: Financial Performance – Lee Miller](#)

Overseeing the financial performance of the schools, making sure Trust money is well spent.

[Video: Budget management and financial planning – Dan High](#)

How financial budgets and finance are managed throughout the trust

## USEFUL RESOURCES

[ESFA: Academy financial handbook](#)

[ESFA: Academy Trust risk management](#)

[Governance handbook](#)

*Page 32 - 35 accountability for financial performance and sources of financial tools and data.  
Page 101 – 107 financial accountabilities for academies and overview of school funding.*

[A Competency Framework for Governance](#)

*Page 16 – 18 financial frameworks and accountability and financial management and monitoring.*

[School Resource Management: Top 10 Planning Checks for Governors](#)

[Schools financial benchmarking service](#)

[Schools financial benchmarking – the role of governors.](#)

*YouTube video from Better Governance*

[School workforce planning](#)

[Financial management and assurance checklist](#)

*Section A: Governance*

[Terms of reference: Finance & Staffing Sub Committee](#)