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# Board reporting

Guidance and templates for multi academy trust boards

These templates set out the breadth and depth of information which should be provided to the trust board. We recommend that the seven reports in this toolkit are provided to trusteesonce per term**.**

Adapt the templates for your trust, taking into account:

* Trust size – reports for larger trusts are likely to include less academy-specific data.
* Meeting frequency and agenda items for trust board and committee meetings.
* Scheme of delegation – how functions and responsibilities are delegated in the trust.
* The views of trust leaders and committee chairs, particularly around the workload associated with producing the reports.
* Trustees’ thoughts on what they find manageable and necessary for effective scrutiny.

Trusts can strike the right balance between effective scrutiny and sustainable workload by:

* Ensuring reports are provided with plenty of notice prior to the meeting, so trustees can read them in advance and focus on detailed scrutiny in the meeting.
* Only requesting data which is already being collected by leaders – if it matters, your leaders should already have the information to hand.
* Producing trust-wide templates to ensure reports are focused on key areas, and easy to collate – especially relevant for the report from trust committees and the local tier.
* Including RAG ratings and executive summaries to guide discussions.

Contents

[Trust dashboard 2](#_Toc165271124)

[Strategic priorities 3](#_Toc165271126)

[Curriculum & standards 5](#_Toc165271133)

[Finance 7](#_Toc165271135)

[Workforce and operations 11](#_Toc165271151)

[Safeguarding 12](#_Toc165271157)

[Governance 15](#_Toc165271164)

[Annex: reporting checklist 18](#_Toc165271173)

## Trust dashboard

* This report provides an at-a-glance overview of the trust’s performance, as evaluated by trust leaders.
* Some ratings in the dashboard will be based on qualitative judgements (such as the quality of governance) while others may be tied to pre-agreed quantitative thresholds (attendance targets, for example).
* The dashboard allows trustees to quickly identify where there are particular concerns about a specific academy or topic, informing further scrutiny.

Report author: Chief Executive Officer

### Dashboard

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Academy (colour coded by most recent Ofsted report) | RAG rating at beginning of year | Attendance | Finance | Staffing | Governance | Safeguarding | Health & safety | Current overall effectiveness (RAG Rating) |
| Academy A |  |  |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |  |  |
| Academy E |  |  |  |  |  |  |  |  |
| Academy F |  |  |  |  |  |  |  |  |
| Academy G |  |  |  |  |  |  |  |  |
| Academy H |  |  |  |  |  |  |  |  |

|  |
| --- |
| Executive summary |
| * Explanation for any red rating – why was it judged red and any relevant context * Highlight trends – are things improving? * CEO’s judgement of trust’s capacity to resolve any issues * Any recommendations to deal with areas of concern |

## Strategic priorities

This report is focused on the trust’s progress towards achieving its strategic priorities, as set out in the board’s strategy document and/or improvement plan.

We recommend that this report:

* Presents data at overall trust level, with comparisons to previous years, and local and national benchmarks where available.
* Allows the board to readily identify trends and patterns. The particular metrics used to judge success should be agreed at the same time as the strategic priorities.
* Breaks down data by academy, where appropriate, to identify areas of best practice or particular concern. In larger trusts, it will be impractical to regularly aggregate by school, and schools may instead be grouped (by phase or geography, for example).
* Rates progress made on each priority as red, amber or green – this may help the CEO to highlight where they feel particular attention is needed.
* Avoids duplicating the same scrutiny that has been provided by committees – for some areas, reporting ‘by exception’ will be sufficient.

Refer to NGA’s [Being Strategic guidance](https://www.nga.org.uk/knowledge-centre/strategic-guide-boards-leaders) for more on monitoring strategic priorities.

Report author: Chief Executive Officer

|  |
| --- |
| Executive summary |
| * A brief summary of progress over the last term * Any specific challenges or achievements in meeting the strategic priorities * Any decisions which the trust board needs to take |

### Strategic priorities

|  |
| --- |
| Priority 1:*Example: ensure every child is in school, so they can benefit from a fantastic education.* |
| RAG rating: Red / Amber/ Green |
| Monitoring data and performance against KPIs:   * *Attendance figures (overall, and divided by academy, with comparisons to previous years, including pre-pandemic).* * *Suspension and exclusion figures (volume, the outcome of any reviews, all divided by academy, and compared to previous years).* * *Any relevant policy changes, e.g. the trust’s approach to persistently absent pupils.* |
| Commentary:   * Any trends/change and the reasons for them * Any recommended next steps |
| Priority 2: |
| RAG rating: Red / Amber/ Green |
| Monitoring data and performance against KPIs: |
| Commentary: |
| Priority 3: |
| RAG rating: Red / Amber/ Green |
| Monitoring data and performance against KPIs: |
| Commentary: |

## Curriculum & standards

* This report provides an update on trust-wide curriculum development, and implementation in individual academies.
* It includes a summary of the latest progress and attainment data (this will be externally validated figures once per year, and projections at other times).
* Avoid duplicating the work of local academy committees and any trust-wide standards and curriculum committees – the trust board will not have the capacity to look at the same level of detail (evaluating subgroups within schools, for example) but will receive reports from its committees about particular areas of concern.
* RAG rate and colour code each data point to highlight the position relative to national benchmarks (above average/average/below average).
* Adapt the groups reported on in line with the trust context – for example, some trusts may want to consider ethnicity.

Report author: Trust-wide education lead (sometimes CEO or Director of Education)

|  |
| --- |
| Executive summary |
| * Broad summary of overall trends * Any specific figures which need particular attention * Progress of curriculum development * Any decisions which need to be taken, such as policy reviews |

### Example data presentation

#### Primary

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Group | RWM% (KS1) | RWM% (KS2) | Progress (Reading) | Progress (Writing) | Progress (Maths) | Avg. score (Reading) | Avg. score (Maths) |
| Academy A |  |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |  |
| Girls |  |  |  |  |  |  |  |
| Boys |  |  |  |  |  |  |  |
| Disadvantaged (FSM) |  |  |  |  |  |  |  |
| Disadvantaged (PP) |  |  |  |  |  |  |  |
| EAL |  |  |  |  |  |  |  |
| SEN pupils |  |  |  |  |  |  |  |
| LAC pupils |  |  |  |  |  |  |  |
| Overall |  |  |  |  |  |  |  |

RWM: Reading, writing and maths (combined score)Secondary

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Group | Progress 8 | Attainment 8 | % Grade 5 (E+M) | % Grade 4 (E+M) | Progress 8 (Maths) | Progress 8 (English) |
| Academy A |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |
| Girls |  |  |  |  |  |  |
| Boys |  |  |  |  |  |  |
| Disadvantaged (FSM) |  |  |  |  |  |  |
| Disadvantaged (PP) |  |  |  |  |  |  |
| EAL |  |  |  |  |  |  |
| SEN pupils |  |  |  |  |  |  |
| LAC pupils |  |  |  |  |  |  |
| Overall |  |  |  |  |  |  |

## Finance

* A financial report which provides the management accounts and a commentary explaining the reasons for any variations or trends.
* Usually, this report will summarise the in-year financial position for both the trust and individual academies, including any variations, followed by forecasts for the coming months in terms of both cashflow and reserves.
* In the largest MATs, it will be impractical to provide figures for every academy, and academies might instead be grouped together.
* Avoid duplicating the more detailed strategic discussionswhich take place when the annual budget is agreed (for example, benchmarking key data such as the gender pay gap against similar MATs).
* Avoid duplicating the depth of scrutiny carried out by the trust finance committee(such as looking at specific budget lines, categories or cost centres).

Report author: Chief Financial Officer

|  |
| --- |
| Executive summary |
| * Broad summary of overall trends * Any specific figures which need particular attention or explanation * Any decisions which need to be taken, for example, signing off specific spends above the delegated threshold, or contract renewals |

### Management accounts

|  |
| --- |
| Income and expenditure |
| * This should cover the actual income and expenditure in the past months, in comparison to the budget set by the trust board, and the consequent year end projection. * The trust board will usually receive figures for individual academies and centralised services, and an aggregated summary for the entire trust. * Clearly show the income that the trust receives through the general annual grant (GAG) and other grants, as distinct from income generated through other activities (such as premises lettings), and the expenditure associated with such activities.   An example format is shown on the following page. |

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Actual to date | % | Budget to date | % | Variance (£) | Revised year-end projection | % | Variance (£) | RAG rating | Comments |
| GAG |  |  |  |  |  |  |  |  |  |  |
| Grants |  |  |  |  |  |  |  |  |  |  |
| Lettings |  |  |  |  |  |  |  |  |  |  |
| Total income |  |  |  |  |  |  |  |  |  |  |
| Pay expenditure |  |  |  |  |  |  |  |  |  |  |
| Non pay expenditure |  |  |  |  |  |  |  |  |  |  |
| Total expenditure |  |  |  |  |  |  |  |  |  |  |
| Surplus/deficit |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |
| Surplus/deficit at academy level: (in year position) |  |  |  |  |  |  |  |  |  |  |
| Academy A |  |  |  |  |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |  |  |  |  |

|  |
| --- |
| Variations |
| Trustees should be provided a commentary explaining the reasons for any significant variations to planned income or expenditure so that they can be assured that the reasons are valid and to identify where further action may be required. Explanations are usually given in either an additional column on the income and expenditure report (as shown above) or in an accompanying narrative. |

|  |
| --- |
| Balance sheet |
| A summary of the money currently in the trust’s bank account, its debtors (those it owes money to) and its creditors (those who owe it money). |

|  |
| --- |
| Cashflow forecast |
| The cashflow forecast allows trustees to see where cash is being spent and whether the trust could run out of cash (usually looking up to 12 months ahead). |

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Actual | Month 1 | Month 2 | Month 3 | Month 4 | Month 5 | Month 6 | Month 7 | … |
| Opening balance |  |  |  |  |  |  |  |  |  |
| Total income |  |  |  |  |  |  |  |  |  |
| Pay expenditure |  |  |  |  |  |  |  |  |  |
| Non pay expenditure |  |  |  |  |  |  |  |  |  |
| Total expenditure |  |  |  |  |  |  |  |  |  |
| Closing balance |  |  |  |  |  |  |  |  |  |

This may be accompanied by a graph to help highlight trends. For example:

A graph of a number of income and tax returns

Description automatically generated with medium confidence

|  |
| --- |
| Forecast including reserves |
| An update on budgetary forecasts in light of the above information, usually for the current financial year. This could include detail on the next twelve months at most, with longer-term forecasts left to the more in-depth budgetary discussions that will not take place at every board meeting.  Forecasts should usually be for individual academies and the trust as a whole. The CFO should provide a commentary to explain any changes, identify risks, and propose any actions. This should be accompanied by appropriate scrutiny from the board, for example:   * Are the budgetary forecasts realistic? * Do the forecasts suggest that the trust as a whole is financially sustainable? * How can we explain the differences between academies – are there opportunities to provide additional support or share best practice? * Is any action needed urgently (prior to the next annual budget)? |

### Forecast net position

Based on an outlook for the full academic year:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Starting reserves | Budgeted net position | Expected net position | Variation (%) | Variation(£) | RAG rating | Comments |
| Trust |  |  |  |  |  |  |  |
| Central services |  |  |  |  |  |  |  |
| Academy A |  |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |  |

See our [guidance](https://www.nga.org.uk/knowledge-centre/monitoring-trust-budgets-management-accounts/) for further advice on the scrutiny of management accounts.

## Workforce and operations

* This report provides an in-year update on key operational areas such as estates, admissions, workforce and health and safety, focused on what has changed.
* This may be provided by one or more senior leaders depending on distribution of roles within the central team.

Report author: Chief Operating Officer (or equivalent lead for these areas, e.g. Head of HR)

|  |
| --- |
| Executive summary |
| * Broad summary of overall trends * Any specific figures which need particular attention or explanation * Any decisions which need to be taken, e.g. policy changes |
| Estates |
| Significant information on the trust estate, for example:   * Results of condition surveys and audits which have highlighted notable issues * Progress of significant infrastructure projects * Headline [estate performance measures](https://www.nga.org.uk/knowledge-centre/estates-management/), such as energy efficiency, for each academy |
| Health and safety |
| * Significant incidents and trends * High level summary of any audits undertaken |
| HR |
| Significant incidents and trends:   * Summary of staff grievances * Settlement agreements * New approaches to staff CPD * Significant recruitment decisions * Headline staffing performance measures, such as turnover data |
| Admissions |
| * Number of pupils on roll, joined and leaving * Any proposed changes to pupil admission numbers * Any significant issues or changes, such as a series of appeals around a specific issue |

## Safeguarding

A high-level strategic update on the trust’s safeguarding, focusing on issues of particular concern to the trust board such as quality assurance and key risks.

This report should cover:

* outcomes of internal and external verification of trust-wide safeguarding practice
* updates on the transfer of knowledge and professional development
* progress made in aligning safeguarding approaches across the trust
* key trust-wide data indicators

It may not always be necessary to cover each of these areas every term if there are no recent changes to CPD or trust-wide processes.

The focus will be trust-wide developments and benchmarking, with only headline data being shared in every report. It is important to avoid duplicating the work of the local tier, who will often scrutinise individual school arrangements in more depth.

Report author: Trust Safeguarding Lead (or equivalent)

|  |
| --- |
| Executive summary |
| * General summary of key developments in the last term * Any specific data points which need particular attention or explanation * Any decisions which need to be taken, such as amendments to relevant policies |
| Audit and quality assurance |
| Outcomes of internal and external verification of trust-wide safeguarding practice, for example:   * Commissioning and outcomes of any trust-wide audits or academy-specific audits where there has been cause for concern * Verification of audits of the single central record – both internal and external * Any major findings (significant risks to the trust and its pupils) from academy-level audits |

|  |
| --- |
| Knowledge |
| Updates on the transfer of knowledge, including professional development, for example:   * Updates on CPD undertaken by the trust-wide DSL, other relevant staff (such as academy DSLs and central team members) * Updates on relevant trust-wide curriculum changes, e.g. teaching about online safety * Updates on changes to CPD available and undertaken by those governing, including trustees and the local tier * Assurance that minimum safeguarding training requirements have been met * How the DSL is receiving assurance that CPD undertaken is influencing practice * Highlighting any changes to law or guidance which the trustees need to be aware of * Any other strategic updates, such as significant opportunities to share and learn best practice from other trusts |
| Systems and processes |
| Ensuring consistency and efficiency of approaches across the trust, for example:   * Updates on changes to trust-wide safeguarding processes and procedures * Updates on success and challenges in aligning academy processes with trust expectations * Consideration of where local tiers might need the autonomy to adapt trust-wide processes and procedures * Any other strategic updates, such as significant opportunities to share and learn best practice from other trusts |
| Data |
| Key trust-wide indicators of effective safeguarding, for example:  Number of safeguarding incidents, divided by:   * Academy (largest MATs may instead group by phase and/or geography) * Type of concern (sexual harassment, racism, Prevent, staff conduct etc.) * Severity – those which required LADO referral and those which did not   Number of children receiving particular support, both aggregated and divided by academy/group of academies:   * Early Help * Child Protection Referrals * Child Protection Plan (and type) * Child in Need Plan * Police Referrals * Looked after Children * Young Carers   Headline summary of relevant stakeholder engagement findings – with staff, parents and pupils.  Data should be presented so that the board can consider trends for the trust as a whole and individual academies or groups of academies, including changes over time. This can then inform challenge of the trust-wide Safeguarding Lead. |

### Example data presentation

#### Safeguarding incidents

|  |  |  |  |
| --- | --- | --- | --- |
|  | Number in last term | Change vs. previous term | Proportion referred to LADO |
| Academy A |  |  |  |
| Academy B |  |  |  |
| Academy C |  |  |  |
| Academy D |  |  |  |
| Total |  |  |  |

Types of safeguarding incidents

Incidents may fall into more than one category. Your trust may want to report on additional categories depending on specific risks that pupils are facing, such as forced marriage or FGM.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Sexual harassment | Racism | Prevent (radicalisation) | Staff conduct | Pupil on pupil conduct | Concerns about home environment |
| Academy A |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |

Pupils receiving support

Total volume (and % change)

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | Early help | Child Protection Referrals | Child Protection Plans | Child in Need Plans | Police Referrals | Looked after children | Young carers |
| Academy A |  |  |  |  |  |  |  |
| Academy B |  |  |  |  |  |  |  |
| Academy C |  |  |  |  |  |  |  |
| Academy D |  |  |  |  |  |  |  |
| Total |  |  |  |  |  |  |  |

## Governance

* The governance report provides feedback to the trust board on key decisions and intelligence from governance committees, link trustees and the trust’s members.
* The trust board will have access to committee minutes, so this report is a more concise set of highlights, taking into account trustee workload.
* It is likely to be collated by the trust head of governance, but its contents will be agreed with committee chairs, link trustees and the trust’s members (where relevant).
* The report combines the highlights of all governance activity outside the trust board and avoids the workload implications of each of these parties needing to produce their own reports.
* The governance professional should help both committees and link trustees by providing reporting templates, and then collating these templates into a single report for the board.

Report author: Head of Governance

|  |
| --- |
| Executive summary |
| * Opportunity for head of governance to communicate any core messages about the development of governance in the trust * Any specific decisions taken outside the trust board which need particular emphasis * Any intelligence which the head of governance judges to be particularly relevant |

|  |
| --- |
| Key decisions |
| The decisions taken will be dependent on which functions have been delegated to committees and the local tier in the scheme of delegation. Common examples include:   * Key decisions of the members from their AGM, e.g. auditor appointment * Approving the trust’s internal scrutiny programme, including potentially an internal auditor (audit and risk committee) * Approval of particular spending decisions (finance committee) * Appointment of new board members (local tier) * Major school improvement interventions, e.g. on attendance or curriculum (local tier) * Significant academy-specific policy amendments to trust-wide template policies (local tier) |

|  |
| --- |
| Significant intelligence |
| Important information which will aid trustees’ decision-making. Committees and link trustees are the “eyes and ears” of the trust board, particularly the local tier. This could include:   * Outcome of review of annual accounts and report (audit and risk committee) * Significant changes to the trust risk register (audit and risk committee) * Headline results of stakeholder engagement, e.g. survey results (local tier) * Volume and type of complaints dealt with (local tier) * Concerns about the school estate (local tier) * Learnings from complaints and exclusion reviews (local tier) * Challenges around governance recruitment/turnover (local tier) * Feedback on the implementation of trust policies, e.g. SEND and safeguarding (local tier) * Key highlights from link trustee visits and meetings (Safeguarding or SEND trustee) |

### Example committee summary

|  |  |  |
| --- | --- | --- |
|  | Key Decisions | Significant Intelligence |
| Members |  | N/A |
| Finance committee |  |  |
| Audit and risk committee |  |  |
| Academy A local committee |  |  |
| Academy B local committee |  |  |
| Academy C local committee |  |  |
| Academy D local committee |  |  |

Some trusts prefer to separate the trust board committees from the local tier, allowing reports to be structured around the delegated responsibilities – this can help to keep the local tier focused on their specific role. An example is shown below:

### Example local tier summary

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Stakeholder engagement (key findings) | Safeguarding – particular concerns and feedback | SEND – particular concerns and feedback | Standards – updates on current key cohorts | Anything else of relevance |
| Academy A | *Headline figures of parental survey – X% felt listened to, X% were proud of the school…* | *Trust policy doesn’t cover forced marriage – we have had two incidents in recent weeks* | *Significant increase in EHC referrals for relating to X needs* | *Current GCSE cohort expected to struggle, but believe this is due to cohort specific factors* | *Roof of maths block condemned, will need significant capital investment* |
| Academy B |  |  |  |  |  |
| Academy C |  |  |  |  |  |
| Academy D |  |  |  |  |  |

### Example link trustee/trustee visit summary

Include key highlights from trustee visits and meetings with staff.

|  |  |  |  |
| --- | --- | --- | --- |
| Name of trustee | Date of visit/Meeting | Reason for visit/meeting | Key Messages for trust board |
| *A Harrison* | *27/3/2024* | *Meeting between SEND trustee and trust SEND lead to receive update on implementation of new policy.* | *Feedback on new approach has been positive from pupils, parents and staff.*  *Some challenges with implementation in academies A and B, further support to be provided.* |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Annex: reporting checklist

A range of specific data and information is detailed within these templates. In addition, at a minimum, the trust board should also receive the information in the following checklist via the various reports being provided to it. If your board does not have access to some of this information, review your reporting arrangements.

|  |  |
| --- | --- |
| Attendance (part of strategic priorities for many trusts) | Included? |
| * Attendance rates * Data breakdown by specific cohorts and pupil groups relevant to identified barriers to attendance (for example, pupils who have a social worker, are from a background or ethnicity where attendance has historically been low, have special educational needs or disabilities or are eligible for free school meals) * The impact of attendance initiatives, such as support for persistently absent pupils |  |
| Behaviour and exclusions (part of strategic priorities for many trusts) |  |
| * Volume of suspensions and exclusions * The outcome of any reviews * Off-site directions and managed moves |  |
| Pupils with Special educational needs (SEN) and looked-after children (LAC) (part of strategic priorities for many trusts) |  |
| * Number of pupils on the SEN register, including type of need and details of pupils with EHC plans * Number of looked after children (LAC) |  |
| Risk management (usually identified throughout, e.g. in finance and workforce & operations reports) |  |
| * Significant risks to the trust, including reputational and financial * Any significant changes to risk controls and risk management systems * Risk register review (by exception) – trustees must conduct a full review at least annually |  |

|  |  |
| --- | --- |
| Stakeholders (will usually be included in governance report as part of local tier remit) |  |
| * Summarised results and actions arising from any stakeholder surveys * Reporting on other engagement methods * Complaints data – volume and type of complaint |  |
| Trust growth and development (part of strategic priorities for many trusts) |  |
| Include (as appropriate):   * Steps taken to increase the trust’s capacity so it can support more schools, such as increases in the size of the central team * Updates on engagement with potential partner schools and regions group * Consideration of whether growth expectations discussed when the strategy was agreed have now changed, and if so why * Induction and ongoing support for any schools joining the trust * Supporting the wider system and helping underperforming schools to improve |  |