

For all those involved in school governance in Oxfordshire

We are very happy for any school or trust to use this document as a basis for their governance work but if you are using it, please acknowledge the source

Introduction

Effective governance provides strategic direction and control to schools, academies and multi-academy trusts (MATs). It creates robust accountability, oversight and assurance for their educational and financial performance and is ambitious for all children and young people to achieve the very best outcomes.

The DfE publishes two Governance Guides – [Maintained schools governance guide - Guidance - GOV.UK](#) and the [Academy trust governance guide - Guidance - GOV.UK](#). These replaced the Governance Handbook, the Competency Framework for Governance and the Clerking Competency Framework.

In the Maintained Schools Governance Guide, the core functions of the governing body are set out as ensuring:

- The vision, ethos and strategic direction of the school are clearly defined
- The headteacher performs their responsibilities for the educational performance of the school
- The sound proper and effective use of the school's financial resources

The governing board and its governors must, as required by [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013](#):

- Act with integrity, objectivity and honesty and in the best interests of the school
- Be open about the decisions they make and the actions they take and shall be prepared to explain their decisions and actions

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email: governorservices@oxfordshire.gov.uk

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It is based on six key features of effective governance:

1. Strategic leadership that sets strategy and champions the school's culture, vision and ethos
2. Accountability with strategic decisions that aim to improve educational standards and financial performance
3. People with the right skills, experience, behaviours and capacity
4. Structures that clearly define governance roles, responsibilities and accountabilities
5. Compliance with statutory and contractual requirements
6. Evaluation to regularly monitor and improve the quality and impact of governance

In the Academy Trusts Governance Guide, the purpose of governance is set out as:

to provide:

- strategic leadership
- accountability and assurance
- strategic engagement

The board has collective accountability and strategic responsibility for the trust. It has a focus on ensuring the trust delivers an excellent education to pupils while maintaining effective financial management and **must** ensure compliance with:

- the trust's charitable objects
- regulatory, contractual and statutory requirements
- their funding agreement

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What is the Annual Schedule?

The schedule gives an overview of governing board responsibilities and helps plan the year's work. Some activities need to be completed by a specific date and suggestions have been made. **Items in bold font are a statutory requirement, requirement by the DfE or linked to our local policy requirements.** Notes and links to relevant publications are listed next to each item. These may be DfE guidance (both statutory and non-statutory), links to Oxfordshire County Council information, resources produced by Oxfordshire Governor Services and by the National Governance Association to support your work; some are freely available, some are linked to your NGA membership.

The main focus of the work of the governing board is to secure **school improvement** and to ensure **statutory compliance** so children benefit. Governors must create robust accountability for executive leaders and be well equipped to ask the right questions.

Governors need to:

- have a clear understanding of the strengths and weaknesses of the school
- be influential in determining priorities for school improvement
- have a clear role in monitoring progress and evaluating impact

How should we use the Annual Schedule?

Use the schedule to help plan the work of the governing board each term. The focus of the board's work tends to change throughout the year and the sections have been arranged to highlight that changing focus.

** Maintained Schools: governing boards of maintained schools may delegate some of their decision-making powers to committees/individuals.*

** Academies: governors of academies should refer to their Articles of Association and Schemes of Delegation when deciding which of the items listed in this schedule relate to their work; items specific to academies are included and have been identified.*

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Reporting from the tasks listed should feed into meetings of the governing board. **The minutes of governing board meetings are the evidence that the work has taken place. If it didn't happen in a minuted board meeting, it didn't happen.**

Ensure that all statutory requirements (**in bold**) are included as agenda items at full governing board meetings.

Consider using the template to tailor the schedule: for example, add details of governor monitoring visits each term, linking these to the School Improvement (Development) Plan.

Useful links

There are many useful documents on the DfE website including:

[Local authority maintained schools: governance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/local-authority-maintained-schools-governance)

[Academy trusts: governance - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/academy-trusts-governance)

The [Governor Services | Oxfordshire Schools](#) website also contains documents useful to governance in Oxfordshire, along with templates and procedures that can be used in conjunction with this annual schedule. Also our termtime Governor Services Newsletter will keep you up to date during the academic year with any changes to legislation or guidance. It is sent to all those on GovernorHub and is posted to the Oxfordshire Governor Services website.

If you have any queries about the Annual Schedule, please email
governorservices@oxfordshire.gov.uk.

Click here for direct links to each term:

- [Autumn term schedule](#)
- [Spring term schedule](#)
- [Summer term schedule](#)
- [Key dates throughout the academic year](#)

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Autumn Term 2026

Key Priorities for the Autumn term:

Structure: Clarify vision, strategic direction, risks and priorities. Review of structure of the board (committees, delegation of duties etc.)

People: Election and appointment of governors to roles/committees

Accountability: Collect baseline data

Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1	Organisation of the Board:	Structures and People		
A1.1	Elect Chair and Vice Chair and agree the length of their term of office.	Only if their term of office as chair/VC has ended. Some boards prefer to hold elections in the summer term, so they are more prepared in September	Procedures for the Election of Chair and Vice Chair of Governors School governance regulations 2013 - GOV.UK (www.gov.uk) (regulation 7, 8 and 9)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1.2	Review the range of committees in place. Agree which committees will be used and then agree their Terms of Reference.	Maintained schools in Oxfordshire will need to have a pay committee in line with the OCC pay policy.	Model Standing Orders 2026-27 (OCC Template) NGA maintained school delegation planner Committee terms of reference National Governance Association School governance regulations 2013 - GOV.UK The constitution of governing bodies of maintained schools GOV.UK	
A1.3	Appoint Committee Members	Must be done by the full governing board in an FGB meeting		
A1.4	Appoint Chairs of Committees	This task can be delegated to each committee by the full governing board		
A1.5	Update the register of business (pecuniary and other) interests	Forms and guidance can be found on the Schools' website Managing the Governing Board Oxfordshire Schools	Financial manual Oxfordshire Schools	

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		Governors with access to GovernorHub can also record their interests on their profile page. The summary of interests for the full board can be printed as a GovernorHub report	How do I make declarations of interest and other confirmations? GovernorHub Help Centre	
A1.6	Agree clerking arrangements for full governing board (FGB) and committees	In a maintained school, the clerk must not be a governor. A governor can act as clerk if the clerk fails to attend but this must not be the headteacher. In an academy trust, the clerk must not be an academy trustee, the chief executive of the academy trust or a principal of one of the trust's academies	School governance regulations 2013 - GOV.UK (www.gov.uk) (regulation 11) Maintained schools: governance guide - GOV.UK - Section 4 People Academy trust governance guide - 4. Non-executive leadership - Guidance - GOV.UK (www.gov.uk) Section 4.5.1	
A1.7	Appoint two or three governors to conduct headteacher's appraisal; ensure they are, or will be trained; appoint your External Adviser	Maintained schools must have an external adviser for headteacher appraisal; this is recommended for academies Training for governors is now required	Headteacher appraisals Schools (oxfordshire.gov.uk) To request an external adviser through Governor Services, visit: Headteacher Appraisals - Package A Oxfordshire Education Services	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A1.8	Appoint Link Governors to specific roles as required Child Protection (safeguarding) Whistleblowing Health & Safety SEND Filtering and Monitoring Pupil Premium Governor training Sustainability and Climate Action Attendance Careers education (secondary schools)	Ensure expectations of link governors are clarified. E.g. frequency of visits and what they are monitoring.	See table for details: Lead Governor Roles for Maintained Schools and Academies in England (Oxfordshire Schools website) NGA link role description template	
A1.9	Agree whether any tasks will be delegated to individuals, committees or the headteacher	Use a delegation planner (maintained schools) or your scheme of delegation (academies)	NGA maintained school delegation planner Academy trust handbook	

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A1.10	Appoint governors to monitoring roles	Either identified in the governor monitoring plan, school evaluation form (SEF) or linked to the School Improvement (Development) Plan (SIP/SDP)		
A1.11	Agree the schedule for the update of statutory policies (see list of statutory policies in the governance guides); agree any delegation of this responsibility and include policies linked to committees in their terms of references	Refer to the gov.uk statutory policies document for permitted delegation. <i>"It is recommended that governing bodies review these policies annually. This is with the exception of the equality objectives policy which can be reviewed every 4 years. "</i> Maintained schools governance guide - Statutory policies for maintained schools - Guidance - GOV.UK (www.gov.uk) Academy trust governance guide - Statutory policies for trusts - Guidance - GOV.UK	Maintained schools governance guide - Statutory policies for maintained schools - Guidance - GOV.UK (www.gov.uk) Academy trust governance guide - Statutory policies for trusts - Guidance - GOV.UK	
A1.12	Ensure the school website is up to date, including but not limited to publishing details of governing structures and people on the school's website: A list of governing board members, associate members and their responsibilities, to include current governors and all governors from the past 12 months	See links for full details of statutory requirements Governors are <i>not</i> responsible for doing the updates but should monitor the accuracy of website information regularly to ensure that statutory requirements are being met	What maintained schools must publish online What academies free schools and colleges should publish online Checklist produced by GovernorHub Knowledge:	

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	A list of all agreed committees (if used) and their membership Governors' attendance record at governing board and committee meetings over the last academic year, including those governors who left within the last 12 months The register of business (pecuniary and other) interests	Note: Diversity data - Schools are encouraged to collect and publish governing board members' diversity data. Board members can opt out of sharing their information, including protected characteristics, at any given time including after publication	Website publishing requirements and your role GovernorHub	
A1.13	Ensure details held about people involved in governance are provided to the Secretary of State via GIAS (Get Information About Schools)	The update is usually done by school staff members, but governors are responsible for ensuring it is done. If you use GovernorHub, a report can be downloaded to support this statutory duty on the About tab.	Get information about schools	
A1.14	Maintained schools: Update GovernorHub with the following details: - Chair and Vice Chair - Governance Professional (Clerk) - Committee membership and chairs	It is a statutory requirement for Local Authorities to hold the data requested. We ask that this information is held on GovernorHub and kept up to date throughout the year If you need support to work out how to do this please email	GovernorHub	

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	- Link governors (in particular Safeguarding, SEND and Finance) - Check all governor details are accurate and up to date - Business (Pecuniary) interests - Confirm all governors have read Keeping Children Safe in Education 2026 (on their personal profile)	governorservices@oxfordshire.gov.uk and we can talk you through it or even arrange training for your board		
A1.15	Review and adopt the Governors' Code of Conduct and agree adherence to the Nolan principles of public life. This should be confirmed on governors' individual profiles on GovernorHub	The Maintained Schools governance guide advises boards to adopt and adapt the NGA code of conduct (free to access whether a member or not)	Maintained schools: governance guide - GOV.UK (See section 2 Strategic Leadership) Academy trusts: governance guide - GOV.UK (See section 1 Culture and Engagement) Code of conduct in schools National Governance Association The Seven Principles of Public Life - GOV.UK	
A1.16	Review governor terms of office to check whether any are ending within the next term	For any LA governor terms ending after Christmas, please email Governor Services now	Governor Recruitment Schools (oxfordshire.gov.uk)	

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	Run parent and staff governor elections if there are vacancies; recruit governors to other unfilled positions on the board			
A1.17	Link planned training and recruitment of governors to needs and gaps identified in the skills audit	It is best practice to complete a skills audit every year to identify skill and gaps within the board so that training and recruitment can be targeted	Governor Skills Audit National Governance Association (nga.org.uk) Training and development Schools (oxfordshire.gov.uk)	
A1.18	Consider creating a governance action plan to support the development of robust governance			
A1.19	Consider making links with other governing boards to offer peer review	Speak to your Regional Educational Partner (REP) in the first instance. Your headteacher will be able to advise who this is.		
A1.20	Review subscription to Governor Training and other support – ensure all board members, headteacher and clerk are aware of training, resources and help available		Oxfordshire resources: Oxfordshire Governor Services Schools	

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	Encourage governors to sign up to Schools News by visiting https://educationservices.oxfordshire.gov.uk and completing the sign-up form, making sure to note Schools News as your reason for subscribing		Training and development Schools (oxfordshire.gov.uk) NGA.org	
A2	Board's Purpose and Role: Strategic Leadership and Accountability			
A2.1	Agree the current school self-evaluation form (SEF)			
A2.2	Agree the School Improvement/Development Plan (SIP/SDP)	Ensure it is linked to the budget	Integrated curriculum and financial planning (ICFP) - GOV.UK (www.gov.uk)	
A2.3	Map out, and agree, the governor monitoring plan	The plan should be linked to the success criteria of the agreed School Improvement/Development Plan	Managing the Governing Board Oxfordshire Schools Example Governor Monitoring Plan	

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A2.4	Agree content and format of headteacher's report	Ensure the headteacher's report includes data on exclusions and attendance, and allergy safety serious incidents and near misses (new requirement this year)	Maintained schools governance guide - 3. Accountability - Guidance - GOV.UK Academy trust governance guide - 5. Executive leadership - GOV.UK	
A2.5	Receive and scrutinise the headteacher's report	Headteachers must report regularly to governors It is best practice for the headteacher to provide a written report to governors at least three times a year		
A2.6	Plan for collecting staff, family and pupils' voices and opinions throughout the year			
A2.7	Plan communications to the community			
A2.8	If the school is an admissions authority (academies, foundation and voluntary aided schools) draw up the admissions policy for the next academic year	This should be consulted on if changes are proposed; if no changes are proposed, this should be consulted on every seven years	School admissions code - GOV.UK (www.gov.uk)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A2.9	Annual review of nursery Published Admission Number (PAN) for the next Academic Year		Establishing school-based nursery provision - GOV.UK School admission arrangements - GOV.UK	
A2.10	Review performance data including: - Ofsted, Fischer Family Trust data (if the school subscribes to FFT), Analyse School Performance Data and Inspection Data Summary Report sources - Pupil progress and attainment, including for identified groups (eg SEND, Pupil Premium etc) - External exam results	Consider implications for the school Is the school improvement plan having the intended impact?	Understanding school and college performance measures - GOV.UK	
A2.11	Look at impact of additional grants/funding on identified pupils (pupil premium, Service pupil premium, P.E and sports, special educational needs and disabilities (SEND) funding etc.	Are they having the expected impact?	Relevant links to guidance can be found here: Governing board work for link governors and committees Oxfordshire Schools	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A2.12	Review and monitor specified curriculum areas	As agreed in the Governor Monitoring Plan and in line with your school's Governor Visits policy	Governing board work for link governors and committees Oxfordshire Schools Governor monitoring visit form	
A2.13	Receive and discuss reports on curriculum developments	Especially in relation to teaching the national curriculum and the quality of education	National curriculum - GOV.UK (www.gov.uk)	
A2.14	Review the quality of education through triangulation of the headteacher assessment, governor visit information, external reports and pupil tracking data			
A2.15	Conduct Headteacher's appraisal (Appraisal Sub-Group)	Appraisal is recommended for academies Maintained schools are recommended to undertake the headteacher's appraisal before that of teachers	Headteacher appraisals Schools (oxfordshire.gov.uk)	
A2.16	Review pay policy ASAP after publication of pay and conditions document in time to inform pay decisions in the autumn term Ensure Staff Pay Policy is adopted	The OCC model policy for maintained schools is available in the Autumn term	School teachers' pay and conditions - GOV.UK HR policies - P Oxfordshire Schools	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A2.17	Ensure staff job descriptions have been reviewed by the headteacher.			
A2.18	Receive report on teacher appraisal process		HR policies - P Oxfordshire Schools	
A2.19	Ensure the pay committee (or governor panel) has received recommendations from the Headteacher for teacher pay and the appraisal sub-group for headteacher pay		HR policies - P Oxfordshire Schools	
A2.20	Confirm pay decisions for all teachers by 31 October 2026 and for the headteacher by 31 December 2026	For maintained schools, the model policy is updated every year during the Autumn term This is advisable for academies	Schools HR Oxfordshire Schools	
A2.21	Staff wellbeing: improve workload and wellbeing and support workload reduction in your school		Improve workload and wellbeing for school staff - GOV.UK (www.gov.uk)	
A2.22	Monitor safeguarding in school by visiting during the school day: talk to staff and children, monitor policies in practice, review the single central record (SCR)	Best practice is at least termly monitoring	Safeguarding Overview for Boards	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A2.23	Monitor the budget	For maintained schools this should happen 6 times a year Period 6 (for September) must be returned to the LA by 15 Oct 2026	Budgets Oxfordshire Schools	
A2.24	Plan a Health & Safety visit by your link governor		Health and safety: advice for schools - GOV.UK (www.gov.uk)	
A2.25	Review attendance of pupils, including groups	Compliance with legislation is now a statutory requirement	School behaviour and attendance: parental responsibility measures - GOV.UK (www.gov.uk)	
A2.26	Complete asset management plan		Good estate management for schools - Strategic estate management - Guidance - GOV.UK (www.gov.uk)	
A2.27	Ensure pupil premium eligible pupils are included on the October census to attract funding		Pupil premium: overview - GOV.UK	
A2.28	Review net capacity of the school	How full is your school? What impact does this have on your available budget?	School Organisation and Planning Schools (oxfordshire.gov.uk)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
A3	Quality of Governance:	Compliance and Evaluation		
A3.1	Ensure all required information is published on the school website	Relates to the whole website, not just to governance Governors are responsible for ensuring it is up to date, <i>not</i> actually updating it The school's website should be reviewed regularly throughout the year to check it is compliant and up to date.	What maintained schools must or should publish online - GOV.UK What academies and further education colleges must or should publish online - GOV.UK	
A3.2	Confirm Whistle-blowing procedures are in place	Update details in the Whistleblowing policy and confirm staff have been informed	HR policies - W Oxfordshire Schools Whistleblowing procedure for maintained schools - GOV.UK How ESFA handles whistleblowing disclosures - GOV.UK	
A3.3	Ensure all governors have completed a DBS (disclosure and barring service) check and section 128 check	This will usually be organised through the school office	Keeping children safe in education - GOV.UK (www.gov.uk)	

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		The DBS must be applied for within 21 days of election or appointment to the board in a maintained school		
A3.4	Approve strategy statement on use of Pupil Premium and publish on the school's website Pupil premium strategy statement must be published in the school's website by 31st December 2026	You MUST use the DfE template Include evidence used to inform decisions The statement must still be updated annually to reflect:- • Current academic year spending activity. • The impact of Pupil Premium in the previous academic year.	Pupil premium - GOV.UK Pupil premium information for schools and alternative provision settings Service Pupil Premium: what you need to know - GOV.UK Education Endowment Foundation.org.uk Pupil Premium Guidance	
A3.5	Review DfE Publications to ensure all governors and clerks are aware of current guidance	Updates are shared with governors in the Governor Services termtime newsletter which is emailed to all GovernorHub subscribers and is also available here: Governor Services Oxfordshire Schools If you are not receiving the update, please contact Governor Services	Local authority maintained schools: governance - GOV.UK Academy trusts: governance - GOV.UK	

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A3.6	Ensure governing board is GDPR compliant Put monitoring in place to ensure GDPR compliance of school		Data protection: toolkit for schools - GOV.UK	
A3.7	Review and agree the annual safeguarding self-assessment audit (Section 157/175) report and submit online using Evaluate My School before the deadline of 27th November 2026	This will be available from 13 th July 2026. Section 1 to be completed by 11th September 2026 Must be discussed and approved at an FGB meeting prior to submission Note – Schools will be sent details of how to register for Evaluate My School if they are not already registered.	Safeguarding Schools (oxfordshire.gov.uk)	
A3.8	Ensure governors have read the latest version of Keeping Children Safe in Education (2026)	Following consultation, this was published in July 2026 and will be effective from 1 st Sept 2026 Note that all governors must read the whole document. Each governor (maintained schools) should confirm compliance on their GovernorHub profile	Keeping children safe in education - GOV.UK	

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A3.9	Ensure all governors have completed Level 2 Safeguarding training and record training record on GovernorHub	There is a statutory requirement for safeguarding training from September 2022. Oxfordshire best practice is that all governors must complete level 2 safeguarding training as part of their induction. This training should be updated every 3 years Governor Services Safeguarding Children Level 2 training fulfils this requirement	Keeping children safe in education - GOV.UK	
A3.10	Ensure all governors have completed Prevent Duty Course 1 (Awareness) and record on GovernorHub training records	Standard free government course. Should be completed every time it is revised and as often as the board determines Note – there is now a Refresher Awareness course available for those who have previously completed the training	Prevent duty training: Learn how to support people vulnerable to radicalisation Prevent duty training (support-people-vulnerable-to-radicalisation.service.gov.uk)	
A3.11	Review School Safeguarding action plan generated by the section 175 return	Note required actions and monitor termly	Safeguarding Schools (oxfordshire.gov.uk)	
A3.12	Ensure all staff safeguarding training is in place	Note any gaps and follow up		

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A3.13	Review and monitor compliance with cost of school uniform statutory guidance . Update policy to reflect new guidance if necessary	NEW From September 2026: - schools must limit the number of compulsory branded items of uniform and PE kit to 3 or fewer - secondary and middle schools must limit the number of compulsory branded items of uniform and PE kit to 4 or fewer, if one is a tie NB Equality and Human Rights guidance on preventing hair discriminations	Cost of school uniforms - GOV.UK School uniforms: guidance for schools - GOV.UK Preventing hair discrimination in schools Equality and Human Rights Commission (equalityhumanrights.com)	
A3.14	Check that the school is now compliant with attendance statutory guidance		Working together to improve school attendance - GOV.UK	
A3.15	Ensure that the school has an Allergy Safety Policy	New statutory requirement for September 2026. There is a template policy on the attached links. Note the requirement to monitor serious incidents and near misses	Allergy safety in schools statutory guidance Allergy safety policy – template Individual Healthcare Plan template 4 July 2026.docx	

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Spring Term 2027

Key priorities for the Spring Term:

Strategic Leadership: Drafting and approving the budget for the new academic year for maintained schools (approval deadline at the start of the summer term)

Collaborative working: who are we working with to enhance professionalism of staff or quality of education? (e.g. working with the LA or trust)

Accountability: Receiving reports on data, benchmarking, comparison with previous years, budget monitoring, appraisal mid-year review update, external accountability e.g. diocesan visits or School Improvement visits

Compliance: Monitoring of H&S, employment law, safeguarding, SEND, inclusion, equality & diversity, whistleblowing

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr1	Board's Purpose and Role:	Strategic Leadership and Accountability		
Spr1.1	Draft and approve budget for the coming year (maintained schools)	This should be done in committee meetings and approved by the full governing board <i>before</i> the Chair emails your EFS finance adviser to confirm. The email will need to have a copy of the approved budget at summary level attached. Deadline for maintained schools to submit a governing body approved budget to the LA via EFS (Education Financial Services) has not yet been confirmed, but following previous years will be <i>the first Monday in May</i> Maintained Special School are required to submit their budget by <i>the second Monday in May</i> (also to be confirmed) Where a deficit budget is foreseen, a draft budget must be submitted <i>before the end of March</i>	Budget and financial planning Schools (oxfordshire.gov.uk)	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr1.2	To inform planning of the new budget: - Review benchmarking information - Review and agree insurance arrangements - Review staff structure		Home - Financial Benchmarking and Insights Tool - GOV.UK	
Spr1.3	Agree purchase of external services from OCC linked to the budget	The buyback of traded services such as Governor Training, Clerking Service, External Appraisal Support etc usually opens in February and remains open until June	Oxfordshire Education Services	
Spr1.4	Complete and agree the Schools Financial Value Standard (SFVS)	Chair to approve online by the OCC deadline, after discussion with the FGB <i>Deadline has not yet been confirmed by OCC Finance, but is usually around mid-February. The Finance website link is usually updated at the turn of the year after the DfE publish the year's information.</i>	Schools Financial Value Standard (SFVS) Oxfordshire Schools Schools financial value standard (SFVS) and assurance statement - GOV.UK	

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr1.5	Monitor the current year's budget	<i>For maintained schools:</i> Period 9 (for December 2026) will be returned to the LA by Friday 22 January 2027 and Period 11 (for February 2027) by Monday 15 March 2027	Budget monitoring Schools (oxfordshire.gov.uk)	
Spr1.6	Receive and scrutinise the Headteacher's report	The headteacher should formally report to governors on a regular basis		
Spr1.7	Review progress with the School Improvement/ Development Plan (SIP/ SDP)			
Spr1.8	Update the self-evaluation form (SEF)			
Spr1.9	Receive and discuss reports on curriculum developments, especially in relation to teaching the national curriculum and the quality of education	The revised curriculum is expected from the DfE in Spring 2027.	National curriculum - GOV.UK New curriculum to give young people the skills for life and work - GOV.UK	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr1.10	Review and evaluate monitoring from any planned governor visits as agreed in the monitoring plan		Managing the Governing Board Oxfordshire Schools Find monitoring visit forms and a template monitoring schedule here	
Spr1.11	Review pupil progress and attainment, including for identified groups	Those excluded, suspended or educated off site should be included in any review of progress and attainment	Suspension and permanent exclusion from maintained schools, academies and pupil referral units in England, including pupil movement	
Spr1.12	Review the quality of education through triangulation of the headteacher assessment, governor visit information, external reports, pupil and parent voice and pupil tracking data			
Spr1.13	Review Charging and Letting Policy	To ensure it complies with safeguarding policy	Keeping children safe in education - GOV.UK	
Spr1.14	Continue with agreed community communication plan			

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr1.15	Publish proposed admissions arrangements for subsequent academic years (for schools that are admissions authorities) in good time to ensure a transparent process	This is relevant if you are a Voluntary Aided school or academy Please contact the OCC Admissions team if you need advice	School admissions code - GOV.UK School admissions Oxfordshire Schools	
Spr2	Organisation of the Board: Structures and People			
Spr2.1	Review governor terms of office to check if any are ending in the next term Take action to fill current vacancies	For any LA governor terms ending after Easter, please initiate the process now	Governor Recruitment Schools (oxfordshire.gov.uk)	
Spr2.2	Run parent and staff governor elections the school term <i>before</i> the term of office ends	Parent governors cannot be reappointed or rolled over. A new election must be held each time a term of office ends The current parent governor can, however, stand for re-election The process is delegated to the Headteacher by the Local Authority	Governor Recruitment Schools (oxfordshire.gov.uk)	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr2.3	Review the board's succession plan and book training	Refer to skills audit for training gaps and refresher courses	Training and development Schools (oxfordshire.gov.uk)	
Spr3	Quality of Governance:	Compliance and Evaluation		
Spr3.1	Adopt, agree and ratify any policies as per the schedule		Maintained schools governance guide - Statutory policies for maintained schools - Guidance - GOV.UK (www.gov.uk)	
Spr3.2	Ensure all required information is published on the school website	Relates to the whole website, <i>not</i> just to governance Governors are responsible for ensuring it is up to date, <i>not</i> actually updating it	What maintained schools must or should publish online - GOV.UK What academies must or should publish online - GOV.UK	
Spr3.3	Ensure details held about people involved in governance are provided to the Secretary of State via GIAS (Get Information About Schools)	The update is usually done by school staff members, but governors are responsible for ensuring it is done If you use GovernorHub, a report can be downloaded to support this statutory duty	Get information about schools .	
Spr3.4	Review School Safeguarding audit form (Section 175 return) and associated action plan	Note required actions and monitor these termly	Safeguarding Schools (oxfordshire.gov.uk)	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
Spr3.5	Monitor safeguarding in school by visiting in school day: talk to staff and children / monitor policies in practice			
Spr3.6	Request an Education Safeguarding Advisory Team (ESAT) safeguarding review	This is free for maintained schools; academies can also book this service for a fee	ESAT Safeguarding advisory review Terms of Reference.docx	
Spr3.7	Ensure that any new governors have booked an induction course and completed level 2 Safeguarding training and Prevent (Awareness) training. Some governors should also complete Safer recruitment training and Cyber security training The Safeguarding lead governor should complete level 3 Safeguarding training every 2 years	All governors to undertake safeguarding training as part of their induction Best practice is to complete the Level 2 safeguarding training (valid for 3 years) and Prevent training, where a refresher course is available annually	Training and development Schools (oxfordshire.gov.uk) Safeguarding overview for boards	
Spr3.8	Review effectiveness of Pupil Premium, SEND and PE and Sports Premium partial transitional funding (expected to be two terms for maintained schools)	The new Partnership Network arrangements are expected from January 2027	Pupil premium - GOV.UK PE and sport premium for primary schools - GOV.UK £1bn boost to PE and school sport to end fitness postcode lottery - GOV.UK	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Task	Comments	Guidance/Documents link	Done
	Consider impact of the new PE and School Sport Partnerships Network			
Spr3.9	Review the effectiveness of SEND funding			
Spr3.10	Review attendance of pupils, including groups (such as children with special educational needs and disabilities; children qualifying for pupil premium funding; children excluded, suspended or learning off-site; year groups etc.)		Working together to improve school attendance - GOV.UK	
Spr3.11	Consider commissioning an External Governance Review	To commission an EGR, please request a quote here: External Governance Review (EGR) Oxfordshire Education Services	External reviews of governance: guide for schools and academy trusts - GOV.UK External Governance Review (EGR) Oxfordshire Schools	
Spr3.12	Consider best practice sharing and collaboration with other governing boards			

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Summer Term 2027

Key Priorities for the Summer Term				
Accountability: Review progress on the SIP/SDP/SEF				
Compliance: Approve SEND Information Report, PE and Sports Premium Report and Public Sector Equality statements				
Evaluation: Evaluate the impact of the board over the academic year and plan for the next year				

Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1	Board's Purpose and Role: Strategic Leadership and Accountability			
Sum1.1	Approve budget for new financial year in full governing board meeting (maintained schools) if not already done in Spring term	Deadline for approval of budget online by chairs of governors is 1st May for maintained primary and secondary schools, and 8 th May for maintained special schools <i>NB this has not yet been confirmed by OCC Finance, but these are the usual dates</i>	Budget and financial planning Schools (oxfordshire.gov.uk)	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1.2	Review progress of the School Improvement/ Development Plan			
Sum1.3	Update the self-evaluation form (SEF)			
Sum1.4	Review child protection (safeguarding) policy and procedures for this year	Have they been effective? Are there any issues or concerns from school or the board? Are there any actions needed?	Keeping children safe in education - GOV.UK	
Sum1.5	Review the behaviour principles written statement. Are the board's principles reflected in the school behaviour policy?		Behaviour and discipline in schools: guide for governing bodies - GOV.UK	
Sum1.6	Review attendance of pupils, including groups	Link last updated July 2026.	Working together to improve school attendance - GOV.UK Summary table of responsibilities for school attendance (applies from 19 August 2024)	
Sum1.7	Review pupil exclusions for the year, considering inclusion and equality	Guidance updated May 2026 with new requirements effective from July 2026.	School suspensions and permanent exclusions - GOV.UK	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1.8	Receive report on progress in implementing the accessibility plan		Equality Act 2010: advice for schools - GOV.UK	
Sum1.10	Review Appraisal Policy and appoint subgroup for headteacher appraisal for the coming year.		HR policies and guidance Oxfordshire Schools Headteacher appraisals Oxfordshire Schools	
Sum1.11	Receive Headteacher's report on performance management			
Sum1.12	Review staff attendance			
Sum1.13	Agree a programme of governing board meetings for the next academic year, including committee meetings	Governing boards must meet at least three times each academic year However Governor Services recommends that you have at least 5 FGB meetings each year		
Sum1.14	Monitor budget	For maintained schools Period 3 (for June) will be returned to the LA before 15 July 2027	Budget monitoring Schools (oxfordshire.gov.uk)	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1.15	Audit voluntary funds / school private funds (SFVS question 30)		Schools financial value standard (SFVS) and assurance statement - GOV.UK	
Sum1.16	Academies - Draft budget for new school year	Last year's calendar here for reference.	Academies Calendar (2025-26)	
Sum1.17	Review pupil progress and attainment, including discussions around inclusion and equality		Statistics: key stage 2 - GOV.UK Statistics: early years foundation stage profile - GOV.UK Phonics screening check attainment: England 2025 - GOV.UK Statistics: multiplication tables check attainment - GOV.UK	
Sum1.18	Review and monitor curriculum related areas as agreed in the Governor monitoring plan. Report back to committee or FGB meetings			
Sum1.19	Review the quality of education through triangulation of headteacher assessment, governor visit information, external reports and pupil tracking data			

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum1.20	Receive and scrutinise the Headteacher's report			
Sum2	Quality of Governance: Compliance and Evaluation			
Sum2.1	Adopt, agree and ratify any policies as per the schedule		Maintained schools governance guide - Statutory policies for maintained schools - Guidance - GOV.UK	
Sum2.2	Publish details of how you spend your PE and sport premium funding.	This is now a statutory online return. In 2026 the deadline was amended to 30 September, so date will be confirmed when available. Note the DfE has announced that the PE and Sport premium will be replaced in April 2027. We will update with changes to reporting as they are announced	PE and sport premium for primary schools - GOV.UK Complete the PE and sport premium expenditure reporting return - GOV.UK	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum2.3	Approve the SEND Information Report and publish on the website Review and recommend to the board the school SEND Information Report if a delegated responsibility	The SEND code of practice sets out the legal responsibilities. Note new requirements re CCTV and generative AI from March 2026.	Key documents Oxfordshire Schools SEND code of practice: 0 to 25 years - GOV.UK	
Sum2.4	Approve the annual school public sector equality duty statement and publish on the website		Public Sector Equality Duty: guidance for public authorities - GOV.UK Equality Act 2010 Section 149	
Sum2.5	If relevant to your school, receive an annual report from the Designated Teacher for looked-after children (Children We Care For)		Designated teacher for looked-after and previously looked-after children - GOV.UK	
Sum2.6	Ensure all required information is published and up to date on the school website	Relates to the whole website, not just to governance Governors are responsible for ensuring it is up to date, not actually updating it	What maintained schools must or should publish online - GOV.UK What academies and further education colleges must or should publish online - GOV.UK	

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum2.7	Ensure details held about people involved in governance provided to the Secretary of State via GIAS (Get Information About Schools) remain up to date	The update is usually done by school staff members, but governors are responsible for ensuring it is done If you use GovernorHub, a report can be downloaded to support this statutory duty	Get information about schools	
Sum2.8	Ensure all school staff safeguarding training is in place; note any gaps and follow up	Usually arranged for the first INSET day in September to include all new staff. KCSiE is updated every summer to come into effect on 1st September	Keeping children safe in education - GOV.UK Safeguarding Overview for Boards (OCC)	
Sum2.9	Consider and review progress towards the school's agreed equality objectives These must be updated every four years		Equality Act 2010: advice for schools - GOV.UK	
Sum2.10	Review effectiveness of Pupil Premium, SEND and any other funding	Latest updates in March and May 2026.	Pupil premium - GOV.UK	

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Annual Schedule of Governing Board Business

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum2.12	Conduct self-review of the governing board's effectiveness – consider an external governance review	Evaluate the impact of the board over the last academic year Evaluate the impact of the chair of governors and individual governors to inform development needs	Governing board self-review Skills audit and skills matrix - National Governance Association (nga.org.uk) Governing board self-evaluation questions National Governance Association External Governance Review (EGR) Oxfordshire Schools External reviews of governance: guide for schools and academy trusts - GOV.UK	
Sum3	Organisation of the Board:	Structures and People		
Sum3.1	Review the governing board succession plan and governing board training needs	Refer to www.governorhub.com and OCC Governor Training for current training programme	Training and development Schools (oxfordshire.gov.uk)	
Sum3.2	Consider holding chair and vice chair elections, review of committee structure and membership in the summer term (See A1.1-1.4) in preparation for the new academic year and to ensure that governor positions remain valid	These appointments and elections can be held at any time of the year. Holding them in the summer means being more prepared for the start of the autumn term	Managing the Governing Board Oxfordshire Schools	

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
	until the first meeting of the autumn term (particularly the chair of governors)			
Sum3.3	Appoint two or three governors to conduct headteacher's appraisal in the autumn; ensure they are, or will be trained; appoint your External Adviser	Maintained schools must have an external adviser for headteacher appraisal; this is recommended for academies To commission an external adviser through Governor Services: Governor Services Oxfordshire Education Services Training for governors is now required NB boards may choose to do this at the start of the autumn term	Headteacher appraisals Schools (oxfordshire.gov.uk) Education People Services (EPS) Oxfordshire Schools	
Sum3.4	Review governor vacancies and note end of terms of office to plan recruitment for the next academic year. Where there are currently vacancies, take action to fill them	For any LA governor terms ending after the summer, please email Governor Services now	Governor Recruitment Schools (oxfordshire.gov.uk)	
Sum3.5	Review the school's Instrument of Government (IOG)	Ensure it still meets the needs of the school If you need a copy of your current IOG, please contact Governor Services	How to amend your Instrument of Government	

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Ref	Governing Board Tasks	Comments	Guidance/Documents link	Done
Sum3.6	Check to ensure that your chair of governor's term of office as a governor does not expire before the first meeting of the academic year.	If your chair is not a governor, they cannot be chair! Please contact Governor Services for advice on re-appointment/election in good time to avoid being without a chair of governors over the summer		

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Key dates throughout the academic year

Autumn Term	
September	
Ensure child protection and safeguarding policy is agreed and that board members have read and understood KCSIE for the current academic year. Each member of the board can confirm this on their GovernorHub profile	Local Authority Designated Officer (LADO) Schools (oxfordshire.gov.uk) Keeping children safe in education - GOV.UK
Reception baseline assessment for each child must be completed in the first 6 weeks after they enter reception	Primary assessments: future dates - GOV.UK (www.gov.uk)
30 September – Headteachers who wish to leave at the end of the autumn term must have handed in their resignation by this date	Headteacher recruitment Schools (oxfordshire.gov.uk)
Restructure programme for maintained schools (working with Education Personnel Services (EPS) guidance), start now to implement by summer term	Schools HR Oxfordshire Schools

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Academies - Start of new financial year	Academy Trust Handbook - Guidance - GOV.UK (www.gov.uk) Financial Handbook
October	
Confirm pay decisions for all teachers by 29 October 2026 (tbc)	
School census day – 7th October 2026 (tbc)	Complete the school census - Census dates - Guidance - GOV.UK (www.gov.uk)
Budget monitoring report submitted to LA for period 6 (September) 13 October 2026 (tbc)	
31 October - Deputy headteachers and teachers who wish to leave at the end of the autumn term must have handed in their resignation by this date	
Admission policy consultation (for academy, foundation and voluntary aided schools) to last at least six weeks and to take place between 1 October and 31 January in the academic year before the policy will be used	School admissions code - GOV.UK (www.gov.uk)
Admissions applications to secondary schools close on 30 October 2026 (tbc)	
November	
26 November 2026 – statutory requirement to submit safeguarding report to LA after review and agreement by the FGB	Safeguarding Schools (oxfordshire.gov.uk)

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December	
Headteacher appraisal must be completed and a pay decision made by 31 December 2026 for maintained schools	Headteacher appraisals Schools (oxfordshire.gov.uk)
Spring Term	
January	
School census date 14th January 2027 (includes free school meals data for Pupil Premium funding)	Complete the school census - Census dates - Guidance - GOV.UK (www.gov.uk)
Budget monitoring report submitted to LA for Month 9 (December) 20 January 2027 (tbc)	
31 January - Headteachers who wish to leave at the end of the spring term must have handed in their resignation by this date	
Restructure programme for maintained schools (working with EPS) started January 2027 would be implemented by the autumn term 2027	Restructuring and Redundancy policy for schools
Admissions applications to primary schools close 15 January 2027	

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February	
Schools Financial Value Standard (maintained schools) returned to the Local Authority NB We are told that the date has not yet been set by OCC Finance, however it is usually the last day before the February half term, which would be 12 February 2027	Check here for updates: Schools Financial Value Standard (SFVS) Oxfordshire Schools
28 February 2027 - Deputy headteachers and teachers who wish to leave at the end of the spring term must have handed in their resignation by this date	
Local Authorities confirm budgets for maintained schools	
The DfE confirms academy budgets	
March	
Budget monitoring report submitted to LA for Month 11 (February) Monday 15 March 2027	
National offer day for secondary school places is 1st March 2027	
April	
National offer day for places at primary schools is 16 April 2027	

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Headteachers who wish to leave at the end of the summer term must have handed in their resignation by 30th April 2027	
Summer Term	
May	
The deadline for all maintained primary, including nursery schools and secondary schools to submit their governor approved budget to the Local Authority covering the period 2027-28 to 2029-30 is Monday 1st May (tbc) For maintained special schools the date is 8th May (tbc)	
School census date 21st May 2027 (tbc)	
31st May 2027 is the last date for announcing any proposed redundancies to take place from September	
Deputy Headteacher/Teachers who wish to leave at the end of the summer term must resign by 31st May 2027	
Optional Key stage 1 recommended test period May 2027	
The key stage 2 tests are timetabled from Monday 10 May to Thursday 13 May 2027 (tbc)	School curriculum - GOV.UK

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GCSE and A level exams throughout May and June	
June	
Schools must administer the multiplication tables check within the 2-week period from Monday 31 May 2027 (tbc)	Multiplication tables check administration guidance - GOV.UK (www.gov.uk)
Schools must administer the phonics screening check within the 1-week period from Monday 7 June 2027 (tbc)	Key stage 1: phonics screening check administration guidance - GOV.UK (www.gov.uk)
July	
Budget monitoring report submitted to LA for Month 3 (June) w/c July 12th July 2027 (tbc)	
PE and sport premium funding report must be published by the end of the summer term or by 31 July 2027 at the latest. Return is now completed online. Note that the system is due to change this year, so reporting dates may change.	Complete the PE and sport premium expenditure reporting return - GOV.UK
SATs results are reported to schools, including phonics test results	
August	
GCSE and A Level results are published	

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