

Role Description: Trustee

Introduction

Trustees have legal and strategic responsibility for HLA, setting the context for the CEO and Executive who manage the day-to-day operations of the Trust.

Trustees **work together** to fulfil the core purposes of the Board through:

- **Strategic Leadership** – defining the vision, fostering the Trust’s culture and setting the strategy that aligns with the Trust’s Objects
- **Accountability and Assurance** – robust and effective management of risk and oversight of the Trust’s operations, people, education standards and performance with a commitment to continuous improvement
- **Strategic Engagement** – oversight of relationships with stakeholders, ensuring decision-making is supported by meaningful engagement

Context and Appointments

Trustees are both charity trustees and company directors. They must be aware of and adhere to the legal duties and other duties arising from legislation relating to employment and running of educational establishments, including their contractual obligations under the Funding Agreement.

[HLA’s Articles](#) set out how Trustees are appointed. Appointments are subject to background and eligibility checks and Trustees must verify their identity as required by Companies House. Nominations of new Trustees are made on merit against objective skills criteria and considering the benefits of diversity on the Board.

The skills and responsibilities set out in this document refer to the following reference points and exemplar role descriptions from [CST](#), the [NGA](#) and [The Key](#):

[DfE Academy Trust Handbook](#)

The Academy Trust Handbook (ATH) sets out the mandatory financial, governance, and compliance responsibilities for academy trusts and is a condition of the funding agreement. Trustees must understand and follow the handbook in full.

[DfE Academy Trust Governance Guide](#)

This non statutory guidance provides essential information on strategic leadership and the governance of academy trusts. Links to the [Trust Quality Descriptions](#).

[The Academy Trust Governance Code](#)

The Board has adopted this sector specific voluntary code and will develop the 7 principles into practice as far as possible.

Skills & Responsibilities

Strategic Leadership

- Thinks strategically and can contribute to the development and monitoring of the Trust's strategic priorities and goals and how this aligns to the Trust's charitable Objects.
- Understands the key features of effective governance, including tools and techniques for strategic planning, risk management and the principles of effective change management.
- Aware of national educational policy and the local education context, and how these apply to the Trust.
- Takes ownership of the Trust's financial sustainability ensuring effective resource management across the Trust.
- Awareness of people management, including approaches to staff wellbeing, performance management, recruitment, and retention.
- Uses data to understand College/school performance and to provide effective challenge to Executive and senior leaders.
- Understands their strategic responsibilities with regards to safeguarding and Health & Safety across the Trust.
- Confident acting as an ambassador for the Trust with a wide range of stakeholders (where authorised by the CEO or the Board).
- Connects with and meaningfully engages with stakeholders to inform decision making and ensure the trust is anchored in the needs of the community it serves and the wider educational system.
- Provides appropriate, constructive challenge to ensure that all decisions are made in the best interests of children, young people, and the Trust overall.

People

- Ensures high-quality executive leadership through appointing the CEO and Executive Team, setting objectives and providing effective support and challenge.
- Ensures new Trustees are helped to understand their non-executive leadership role, the role of the Board and the vision and strategy of the organisation enabling them to make a full contribution.
- Demonstrates high expectations for conduct and behaviour for all those in governance and is an exemplary role model in demonstrating these.
- Promotes and fosters a supportive working relationship between the Board and Executive, the Director of Governance, staff and external stakeholders.
- Ensures the workload and wellbeing of Executives is considered.
- Welcomes constructive challenge and is respectful when challenging others. Influences others and builds consensus using persuasion and clear presentation of their views, minimising conflict.
- Recognises the importance of, and values the advice provided by, the Director of Governance in supporting the Board.

Performance

- Ability to hold the Executive Team to account for effective implementation of the Trust's strategy and ensure they have the expertise required to fulfil functions delegated by the Board.
- Establish a positive culture of high educational standards that promotes staff and student safety, inclusivity and wellbeing.
- Capable of using regulatory feedback fully to inform decisions about Trust development.
- Recognises their own strengths and areas for development and seeks support and training to improve knowledge and skills where necessary.
- Obtains feedback from a diverse range of colleagues and stakeholders to inform their own development.
- Capable of evaluating the impact of the Board's decisions on student outcomes.

Structures and Compliance

- Understands the role, responsibilities and accountabilities of the Board, and its core functions.
- Ensures a high performing governance structure that meets the needs of the Trust.
- Understands the principles of delegation, and relationships between Members, the Board, Committees and LGBs.
- Aware of the legal, regulatory and financial context of the Trust including its Funding Agreement.
- Ensures the Trust is compliant with legal requirements, including that all statutory policies and documents are in place.
- Recognises the importance of avoiding, declaring and appropriately managing conflicts of interest.
- Confident speaking up when concerned about non-compliance or where they feel it is not being taken seriously.
- Can identify when to seek the advice of the Director of Governance or an independent external advisor on statutory and legal responsibilities.
- Promotes transparency through the publication of governance information.

Person Specification

Candidates for the role of Trustee must be able to demonstrate the following skills, attributes and behaviours:

- Professional ethics, values and sound judgement, with particular emphasis on the [Seven Principles of Public Life](#).
- The ability to promote a positive, collaborative culture which upholds equality, diversity and inclusion
- Commitment to the Trust and its mission
- Critical listening skills and the ability to ask effective questions
- Ability to think strategically and objectively, take the long view and prioritise
- Capacity to process information quickly and understand relevant data, drawing valid conclusions with a considered approach to risk
- Understands the principles of collective decision making
- Specific skills in one or more of the following DfE recommended areas including finance, risk management, HR experience, IT/GDPR, legal/governance, marketing and education.

Time commitment

Trustees are expected to commit sufficient time to fulfil the responsibilities of the role. As a minimum, this includes attending Board meetings (currently seven per year), termly meetings of any committees they are a member of, and annual strategic events.

Effective preparation is essential. Trustees must read all meeting papers in advance and seek clarification from the Executive Team or other senior leaders where needed via the Director of Governance.

Trustees must also maintain ongoing training and professional development to ensure they remain knowledgeable, up to date, and effective in their role. Training may take place in person, at meetings or online.

Demonstrating commitment goes beyond attendance at formal meetings. Trustees are expected to actively engage in governance by investing time to understand the Trust, its people, and its schools.

When required, Trustees may also be asked to chair committees, join working groups, or participate in panel hearings.