

**Professional
development through
school governance.**

Full research report.

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1. Introduction

The importance of business skills to school governance has long been recognised by Governors for Schools, which, since 2000, has been placing professionals with business expertise on to school boards in order to improve schools. This applies even more acutely to governors being able to fulfil the three core functions of school governance¹ as set out in recent years, particularly in the context of the increased accountability and autonomy of many academies and Trusts.

Conversely, however, because of these higher-order demands that have become explicit in the school governor specification, it has become increasingly apparent anecdotally that being a school governor has become a training opportunity for employees; their enhanced skill-set is then taken back into the workplace. The focus of this research study has been to test the reliability of these anecdotal reports, to identify specific skills that have been developed through fulfilling the school governance role and to report on how the CPD benefits from this are applied back in the workplace.

2. Research questions

In order to understand the professional and developmental benefits for employees who become school governors, and how these benefits can be transferred back into the workplace, we set out to gather evidence that answers the following questions:

1. Do employees' governance and professional roles require the deployment of corresponding skills?
2. What skills relating to their employment role do employees develop through being governors?
3. Are there any other personal attitudes/behaviours that have developed positively through taking on a governance role?
4. How do employees develop skills through being governors?
5. In what ways do these skills then enhance employees' performance in the workplace?
6. What are the barriers to companies benefiting from the development their employees' experience through being governors?
7. What form of recording template might capture for line-managers the evidence of their employees' CPD steps that have been facilitated in the governance role?

1. Ensuring clarity of vision, ethos and strategic direction;
2. Holding executive leaders to account for the educational performance of the organisation and its pupils, and the effective and efficient performance management of staff; and
3. Overseeing the financial performance of the organisation and making sure its money is well spent. *Governance handbook*, GOV.UK – DfE March 2019

3. Sample group

Data was gathered via an electronic survey from a range of employees who had become school governors.

The sample comprised respondents from two sources:

One segment of this sample group was identified from the impact survey Governors for Schools conducted in summer 2018; 183 respondents to this survey had said that they felt that being a school governor had had a benefit on their career. This group was thought to be an appropriate sample group as members would likely be amenable to the objectives of the research and be able to provide a particularly relevant insight into their developmental experience.

The group of 183 governors included employees from a range of professional employment backgrounds and companies and was balanced in terms of age, sex and length of time served as a governor.

The second segment came from employee-governors of four major corporate partners: PwC, KPMG, Bank of England and Allen & Overy. This was because Governors for Schools wanted to be assured of the relevance of the findings to their corporate partners. The identity and total number of employee-governors in this second segment is unknown, owing to difficulties in tracking the precise number of governors within each company.

4. Methodology

The survey was sent to the composite sample group seeking data in relation to research questions 1, 2 and 3. Analysis of the data generated by this survey produced clearly defined, quantitative results.

These results were the definitive basis upon which to frame questions that would explore the underlying factors which determined behaviours. This was done through focus groups / interviews. Research questions 4-7 were explored through this qualitative method of data collection.

5. The Survey

The survey was conducted in January 2019. School governors were asked to rate the importance of a range of skills to their professional role and to their governance role², in order to reveal any correspondence between these two roles.

² Range of skills adapted from *Employer Skills Survey 2017*, DfE, GOV.UK, August 2018

Respondents were also asked to rate the extent to which they felt they had developed in a professional capacity in each of these skills as a result of becoming a governor.

Finally respondents were asked to rate the extent of their agreement with statements relating to their personal and behavioural development through the governance role.

There were 81 responses. The composition of the respondents by group and characteristic can be found in the Tables 5.1.1 and 5.1.2 below.

Table 5.1.1 Composition of respondents by survey group

Sample segment	Why approach this group?	Collection method	Total number in group	Number of responses	Response rate
Impact survey group	Individuals indicated in impact survey that they had developed as a result of being a governor	Direct email	183	60	33%
PwC	Corporate partner	Opt-in web link	~200	18	~9%
KPMG	Corporate partner	Opt-in web link	Unknown*	1	Unknown
Bank of England	Corporate partner	Opt-in web link	~100	20	~20%
Allen & Overy	Corporate partner	Opt-in web link	~30	2	~7%
<i>Total</i>			<i>Unknown</i>	<i>101</i>	

*The total number receiving the survey in this group is not known

Table 5.1.2 Composition of respondents by characteristics

Sex	% of respondents
Male	45
Female	55

Age	% of respondents
18-24	2
25-34	26
35-44	31
45-54	14
55-64	17
65-74	9
75 or older	0
Prefer not to say	0

Region	% of respondents
East	7
East Midlands	5
London	26
North East	3
North West	16
Northern Ireland	0
Scotland	0
South East	24
South West	7
Wales	2
West Midlands	3
Yorkshire / Humber	7

Type of board	% of respondents
Maintained school	53
Local governing body in a multi-academy trust	31
Single academy trust board	9
Multi-academy trust board	5
Free school trust board	0
Free school local governing body	2
Academy council (no formal powers)	0

6. Findings

6.1 Skills that were judged to be significant in both a governance and professional context – from the survey

This survey has revealed a, previously under-recognised, phenomenon: the high degree of transferability of skills between employee-governors' governance and professional roles. As illustrated in the table below, where employees recognise a skill as important for their governance role, on

average 84% of those employees also regarded the same skill as significantly important in their professional role.³

As highlighted in Table 6.1.1 below, the 5 highest scoring skills for their importance in professional roles (out of the 10 rated most important for governance) are:

- Developing professional relationships
- Leading, persuading or influencing others
- Team working
- Strategic planning activities
- Asking challenging/probing questions

Table 6.1.1 Transferability of skills between governor and professional roles

Skill ranking (by perceived importance for governance)	Skill	Percentage of respondents saying this skill is important for governance role	Percentage of respondents also saying this skill is important in professional role (rank)
1	Asking challenging /probing questions	100	95(=4)
2	Analysing performance data and KPIs	100	85
3	Preparing for and attending board meetings	98	83
4	Education and pedagogy	95	27
5	Finance and value for money	95	78
6	Strategic planning activities	94	95(=4)
7	Developing professional relationships	94	98(1)
8	Leading, persuading or influencing others	94	97(=2)
9	Risk management	89	85
10	Teamworking	89	97 (=2)
		<i>Average</i>	<i>84</i>

³ There was one unsurprising exception: education and pedagogy. This skill is rated as important by 98% of employees in their governance context but only 31% in their professional one. This is understandable as most employees who responded to this survey do not work in the field of education.

One employee, in describing the similarities between the two roles, recognised that high level business and strategic approaches are equally important to both contexts. However, the experience of being a governor provides an opportunity to apply skills in a new and creative way:

“The governance role requires similar capabilities to my professional role - but with quite a different emphasis, especially on the financial analysis, strategic thinking and management.”

Another governor said that elements of his/her professional role in which s/he is required to evaluate and review had been enhanced by an opportunity to reflect and learn as a governor:

“I recently reviewed the governance model at a large bank which involved reviewing minutes and management information and sitting in on some committee meetings and it was very interesting to see similar issues in this environment to what I see as a school governor.”

Yet another governor focused on his/her need to provide expertise and challenge in both professional and governance roles, but that practising in the unfamiliar context of school governance had enhanced his/her confidence:

“I am having fun in an area which I am curious and passionate about - I have things I can contribute in meetings with clients. I can experience using my professional knowledge and scepticism in a completely different environment. I think it is a very useful experience.”

There was some variation by employees on different types of governance boards in relation to the importance attached to certain skills used in governance. Most noticeably, 100% of employees who sit on trust boards (multi-academy, single academy and free school boards) responded that HR and recruitment is an important skill for their governance role, while only 62% who sit on local governing bodies said the same. Similarly, 75% of employees who sit on trust boards said that they feel legal expertise is an important skill for their governance role, while only 56% of employees who sit on maintained school boards and 50% of employees who sit on local governing bodies said the same.

This suggests that the particular powers, functions and responsibilities of a governing board may determine to some extent the type of skills that governors deploy. Trustees are subject to the added pressures of absolute accountability for their organisations without the local authority (LA) that supports maintained schools and they are the Trust Board itself which carries the ultimate responsibility for all the schools that have local governing bodies (LGBs) within its Trust.

6.2 (a) Skills developed through being a school governor that are transferrable to a professional context: from the survey

Employees indicated that through being a governor they had developed skills to a significant extent in 10 key areas, as shown in Table 6.2 (a) (1) below.

Table 6.2 (a) (1) Governors' perceived development in skills

Skill ranked by perceived level of development	Skill	% of respondents to the survey saying they have developed "somewhat", "quite a lot", "a great deal"	Among top 5 skills for transferability? (see also table 6.1.1)
1	Education and pedagogy	86%	
2	Asking challenging /probing questions	84%	Yes
3	Preparing for and attending board meetings	70%	
4	Analysing performance data and KPIs	67%	
5	Finance and value for money	61%	
6	Leading, persuading or influencing others	60%	Yes
7	Strategic planning activities	59%	Yes
8	HR and recruitment	59%	
9	Developing professional relationships	56%	Yes
10	Risk management	48%	

Furthermore, four of the 10 skills in which employees report significant development, are also recognised as among the top 5 skills for transferability between governance and professional roles (see table 6.1.1). This suggests there are strong developmental benefits where employees recognise the high degree of transferability between the skills used in their governance and professional roles.

Significantly, several skills that employees scored highly for development potential – asking challenging questions, preparing for and attending board meetings, strategic planning activities and analysing performance data and KPIs – could be categorised as higher level strategic business and management skills. These highly desirable skills are beneficial to an employee looking to advance a career in business or even seek appointment to a non-executive director position.

As one governor noted, the governance role has provided not only an opportunity to develop these skills, but also the space to reflect, learn and

adapt – behaviours integral to high level leadership and an increased sense of confidence in the workplace:

“I have learned enormously from taking on a role as a governor. It provides an excellent opportunity to reflect on my professional role and has been a wonderful opportunity to develop my skills in a more NED style role. That experience definitely has had an impact back in to how I conduct myself in the workplace.”

6.2 (b) The reported impact in a corporate setting of those skills developed through being a school governor: from the Focus Groups/Interviews

Table (6.2.1) above records the categories of skill and professional development in which the survey respondents reported a significant development through their governance role. The responses to the probing focus group/interview question *‘In what ways has sitting on a school board been valuable in your professional life?’* agreed with the reported categories of valuable professional development reported in the survey and with a similar rank order of importance. These are set out in Table 6.2 (b) (1) below.

Table 6.2 (b) (1). Skills and their respective impact in governors’ professional lives

	Skill	Percentage of focus group/interview participants who said they had developed the skill through being a governor and it had proven valuable in their professional life
i	Education and pedagogy	n/a ⁴
ii	Asking challenging /probing questions	93%
iii	Preparing for and attending board meetings	73%
iv	Analysing performance data and KPIs	80%
v	Finance and value for money	47%
vi	Leading, persuading or influencing others	73%
vii	Strategic planning activities	47%
viii	HR and recruitment	53%
ix	Developing professional relationships	40%
x	Risk management	53%

⁴ We did not question focus group/interview participants on how development in education and pedagogy had been valuable for their professional life; in the survey this skill was rated as low in importance in a professional setting by a large majority of governors.

The qualitative conversations powerfully confirmed the findings from the survey and also confirmed their relative order of significance in a developmental hierarchy. The conversations also gave immediate and specific examples of how the governor role had impacted positively on each employee's professional practice.

6.2 (b) (ii) Asking challenging/probing questions

Participants were asked how school governance had a positive effect on their readiness to provide challenge and scrutiny in a professional context.

Recognising the importance of challenge in governance and professional roles

Almost all the participants pointed out that they see providing challenge as central to their professional role and that developing this aspect of working in a school governance context was building up a transferable skill.

"It's meant there's more of a focus on constructive challenge without necessarily delivering on or executing the day to day. I now have a greater understanding of that balance."

In recognition of this, one participant noted that taking on this role in governance had enabled him/her to deliver probing questions, even while remaining detached from the operational detail:

"Crossover between [the] roles is very very substantial. What we do is review the data and information provided by firms and come to a view on that to get ourselves comfortable that the firm is acting appropriately. The way of being involved but distant feels like it has a lot of crossover with the school governor role... It's about treading a line between managing and getting involved in managerial positions and having a removed approach - trying to gain comfort from what you're seeing rather than get too involved. I'm comfortable not knowing as much of the detail - questions need to be valuable even if you're not as close to the detail. I've certainly learnt to ask relevant and sensible questions, even while not being an expert in the field."

Similarly:

"[As an accountant] the role of challenge is important in my professional role. ...It's been important not to take statements at face value and trying to really uncover whether and how a headteacher has achieved their objectives. I've learnt to seek the detail, rather than just nodding something through. This has helped me to carry out appraisals I do at work."

Gaining the confidence to challenge

Many remarked that the governor role had made them more prepared to challenge, and they better recognised its central role across both the governance and professional spheres:

“I feel I have become more forthcoming, simply because the challenge aspect of the role is so central.”

Another agreed:

“I feel better prepared to challenge. I understand that it’s part of any person’s role if they want to progress.”

Others asserted that they felt more able to apply the principles of effective challenge without necessarily being expert on the matter in hand, for example:

“I’ve had to learn how to frame questions in such a way that they still provide scrutiny and challenge, even when I don’t know about the topic too well.”

Related to this, participants said that being able to frame more probing questions had resulted in their more rapid understanding of key issues, remarking that they had:

“... become very good at getting to the nub of the problem.”

“I’ve seen that the questions I’m asking are relevant so I feel validated.”

Their ability to take important decisions had improved after becoming more forthcoming in probing for information and data:

“I feel more confident making a decision and asking for the right information to reach it... I’ve realised that sometimes you have to come down on one side and make (a) decision based on your abilities and the evidence you have in front of you. I’ve learnt not to sweat the small stuff – you have to work through things systematically, not be cowed.”

Learning to take a balanced approach

Providing challenge in a more helpful and constructive way had been a learning point. One noted that the approach to governance had inspired him/her to seek a more even-handed approach in his/her own workplace:

“Have seen a more balanced strategy in action – balancing challenge with support. I feel like my workplace has sometimes been too focused on the former and not the latter.”

Another said:

“Effective challenge and scrutiny is key to my role ... I am there to provide challenge to clients but I need to do this in a way that is considered and respectful.”

Similarly:

“I’ve learnt that at the heart of effective challenge being well received is the way one goes about it. That means being tactful, diplomatic and acting in the spirit of a critical friend.”

One developmental step made through being a governor and crucial to senior management roles in business was pin-pointed by a participant who said:

“Effective challenge has been about learning how to make sure someone does something that they say they’re going to do without being harsh.”

The ability to provide challenge and ask probing questions is crucial for employees as they progress to higher-level positions within organisations. Often this involves taking on responsibilities across a greater number of areas, but often with less operational involvement or knowledge of the detail. This is precisely the position of a school governor whose strategic overview has to be informed by a forensic analysis of reported material that s/he has not lived through on a day-to-day basis and which is unlikely to sit comfortably within his/her regular knowledge-base.

In summary, being a school governor had been a training ground for developing a range of strategies for providing challenge, a greater confidence in asking questions, and an awareness of the value of adopting a constructive and supportive approach to exercising accountability.

6.2 (b) (iv) Analysing performance data and KPIs

Participants were asked how their developing expertise in data analysis and performance monitoring, as school governors, had had an impact on their workplace effectiveness.

Most governors said that they now felt more confident and capable in using and interpreting data. Some also said that they felt more prepared to evaluate the quality of the data itself.

Understanding different approaches to data

A number said that the experience of using and interpreting data in a less familiar context had had a positive impact on their ability to develop and then apply the over-arching principles of data interrogation; this had then been applied effectively to interrogating data in the workplace:

"I work in an educational institution that isn't a school. It's been really interesting to see a school's approach to data and the many different things it has to be aware of. It has complemented the approach I take in my own organisation; it's been useful to see different data and how it can be used in different ways to build up a picture of what needs to be shown ... I better understand different approaches to generating data."

Another said:

"It has introduced me to different uses of data that I wouldn't previously have been aware of."

It was also added that the experience had made it easier for him/her to identify issues that need to be addressed:

"Has opened my eyes to lots of different types of data; feels much easier to pull out information I need to ask relevant questions."

Critiquing data

Some said that they now felt better able to critique data and suggest improvements:

"I've had the opportunity to practise improving and critiquing data, rather than just accepting it."

"A new skill I've learnt is identifying where and how data might be simplified."

Understanding the relationship of data to real life

Many governors said that the experience of school governance had led them to re-appraise the usefulness or completeness of quantitative data:

"I have a numbers background; much of the data is very new to me. It's led me to take things less at face value. I feel more likely to interrogate the data a bit more... think a bit more about what data is trying to show us."

There had been a realisation that quantitative data must sit alongside other observations and unmeasurable forms of evidence:

"I've learnt how data relates to real life – not just what appears in graphs and tables."

And that they had become more accustomed to balancing data with a range of professional viewpoints:

“I’m learning to get different viewpoints about the same subject... hearing about something from a teacher in an unfiltered way can be very different from what is presented to you as a governor.”

As part of the monitoring function, school governors are asked to interpret forensically and evaluate a range of evidence in order to form an overall picture of how a school is performing. As such, they must confront head-on whether the quantitative data they study is providing a sufficiently nuanced, complete, and real-life view of performance.

Responses in the focus groups indicate that governors in their workplace had become more prepared to question the use or application of quantitative data where they suspected that it was not showing a full and/or accurate picture.

As well as introducing employees to different uses of data, school governance has instilled a readiness to critique data and question its limitations. This is undoubtedly a developmental step in circumspection and confidence that will enhance employee performance in the workplace.

6.2 (b) (iii) Preparing for and attending board meetings

Participants were asked whether or not their experience as a school governor had helped them to develop a more disciplined and efficient management of the time given to preparing for and executing meetings.

73% responded that the experience had resulted in their improved time and task management.

Stepping up to more commitments

Being a governor:

“... has certainly tested me; it’s an additional commitment that I’ve had to build into my life.”

Another said:

“It has definitely helped me with time management. I’ve had to juggle commitments alongside having a full time job.”

While governance is, on the face of it, a role that takes up a few hours each month, the potential impact it can have on routines and schedules is significant and requires people to operate in an efficient and planned manner:

“Governance is more than simply attending board meetings. It’s also about preparation, visibility, getting to know staff. It’s all very important.”

And:

“There’s more to it than just the meetings. You have to go into school; meet the senior leaders...”

One participant explicitly recognised his/her increasing capacity to be adaptable and agile in managing additional responsibilities. It’s about:

“Managing more commitments ... showing flexibility. It’s another thing in addition to your job. You have to learn to prioritise. Make sure you’re in the right place at the right time...”

Demonstrating proactivity and agility

In addition to improved organisational skills and flexibility, some employees recognised in themselves a new trait of being proactive in order to meet the demands of governance.

For example:

“It feels more natural to be well-prepared. I’m more prepared to spend time digging around, challenging what you get, not just accepting the status quo and things at face value.”

Another factored in the additional preparation that is needed for ‘reading around’ an unfamiliar topic:

“I’ve recognised the importance of preparation, particularly when you have to prepare for something you don’t know much about.”

It was recognised that the demands of performing well as a governor meant preparing not just for meetings and events, but planning proactively to engage with the role even where meetings were not imminent:

“The intermittent nature of the role has led me to take initiative, going to meet staff, visiting the school so that I continue to be effective...”

Not only had participants in the focus groups developed better time management skills, but also they had developed a more enterprising and proactive approach to performing well, because of needing to counteract the possible inertia induced by long periods without formal meetings or events. This often involved taking the initiative to undertake research, to get to know staff or to read around a subject. This led to better planning and preparation even during what might be thought of as governance ‘down-time’, in which the more structured demands of governance – board meetings, inspections, panels, and recruitment rounds – were less pressing.

This finding is particularly notable. It indicates that fulfilling a governance role alongside a corporate role is a practice-ground for functioning

successfully in a work environment which is multi-layered and requiring an organised and prioritised response to work-streams. Working agilely and independently on multiple work-streams or projects, often from a distance and without formal or regular touch-points is increasingly common in the 21st century workplace. School governance has provided a valuable opportunity to develop the skills and robustness to manage successfully in such a situation.

6.2 (b) (vi) Leading, persuading and influencing others: developing interpersonal skills as part of a team

Well over half of participants reported that they had learnt a great deal about how to lead, persuade and influence others when team-working on their governing body. Thus they felt better able to function more effectively in team-working situations in their companies.

A more collaborative approach

One participant said that working with a wide range of people had inculcated a more co-operative approach:

“It has helped me to become better at sharing tasks; ensuring people are on the same page in terms of strategy.”

The opportunity to collaborate on tasks had been a new and valuable experience in the governance role:

“Different groups on the board have had different focuses and we take it in turns to scrutinise each other’s work. I wouldn’t normally have the chance to do this in my professional role.”

“Schools are a particularly collaborative place – more so than many professional habitats – so it’s useful and eye opening to look at the unity of purpose that can be translated to a different type of workplace.”

Working with people from different backgrounds

The size and diversity of the governance teams had led one respondent to take steps to become more consultative in the workplace:

“Working with people of different ages, those who have children at the school – you have to learn to listen to people from these different backgrounds, ensuring their views are heard and taken on board.”

Others said:

“My team has been growing at work – my board experience has definitely helped my ability to provide leadership across a large and diverse group.”

“I feel better at explaining things to diverse groups; this has been useful as I work with a number of different clients who may come from different backgrounds.”

The experience of working with individuals from different backgrounds had been eye-opening:

“I certainly feel more familiar working with professionals in a separate sector – one that feels very different from my own and has a number of particular characteristics.”

It was acknowledged by one participant that there are challenges to working with individuals who have different temperaments:

“You have to learn to deal with other outspoken governors.”

Also one had to develop new strategies to manage a large, diverse group:

“I’m much better at closing conversations down and moving on; getting people to know what their next steps are; what is expected of them ... clarity.”

It is clear that these school governors had been brought into contact with individuals from a range of backgrounds and with differing skillsets and priorities. Employees had been challenged by this unfamiliar and diverse setting and had been confronted by the demands of leadership when out of their comfort zones.

The opportunity for reflection on their learning journey in governance had led to these employees recognising how many new skills they had learnt and applied; there was further recognition of the obvious benefits for those employees seeking progression to leadership roles within a corporate setting. Significantly, corporate documentation shows that there are increasing efforts by employers to ensure that, at all levels, their employees acquire skills and attributes that enable them to persuade, influence and lead a diverse group of people. The synergy created by developing skills through governance, and then transferring them into the corporate workplace is clear to see.

6.2 (b) (viii) Human Resources and Recruitment

In performing their duties, school governors are regularly confronted with a wide range of human resources (HR) scenarios, ranging from recruitment to disciplinary hearings. Each of these demands the intensive application of a range of skills and procedures. Participants were asked how the governor

role had promoted the development of such skills and how these had been used in the workplace.

Improved knowledge

Participants remarked that exposure to HR matters had given them valuable experience 'on the ground' that had provided exemplars of situations that had emerged in the workplace. One participant said:

"One of my roles as a director is to look after HR. School governance has given me much greater practical experience."

A participant, who had been involved in recruitment on the board, said that the:

"... experience has taught me the importance not just of recruiting based on qualifications or paper but in gaining a wider sense of the personality of recruits and how that fits into the wider team."

It was stated by one interviewee that:

"I don't currently recruit in my role but at the outset it has provided me with some knowledge and awareness of [HR] issues, particularly regarding safety."

Sitting on a recruitment panel in his/her capacity as governor was a first experience of this responsibility; it had prepared him/her for taking the responsibility when it would arise later on in the company:

"I'm not currently involved in recruitment but when I get more involved with it later in my career it will prove valuable. In particular, I feel like I am much more prepared for an interview situation. I have seen the different ways that people can react when they are being interviewed – I feel like a better judge of character in that sense. It's not just what people say but the way that they say it."

Experience in a new context

Some participants who were more experienced in HR said that the governor role had opened their eyes to different ways of doing things:

"It's been really instructive to compare and contrast approaches between my company and school. If anything I've seen that the school approach is slightly tougher and more procedural. Has helped me to contextualise my own practice and for me to explore my own approach."

In a similar vein:

“Previously I was always focused on one organisation [in the financial sector]. Being involved in pay conversations, recruitment etc. has been really instructive. Carrying out these activities in a different environment has been a development point for me. You can see how things are dealt with in a different industry.”

Yet another said:

“Hearing about experiences in a different educational organisation has been really beneficial. It has introduced me to new and different practices around managing wellbeing, staff issues, and managing underperforming staff. It has allowed me to share practice from my professional role and bring it into a new setting; not just me providing my skills but learning how to share my skills.”

Others had been able to support the school through their existing expertise, and in doing so had learnt how to provide support in a different context:

“Around recruitment, the school has taken on some of the things I suggested. In some ways I’ve given more to them in this area, but I have learnt how to give advice in a new setting.”

This participant also said that being involved in serious HR matters had provided the opportunity to manage sensitive issues and demonstrate leadership and management at a challenging time:

“Being involved in serious HR situations – you have to learn how to contain them so they don’t take over the whole school.”

Dealing with HR issues in a school governance context had provided wide and practical experience in a range of scenarios – often occurring in intensive and demanding episodes. HR issues encapsulate many core strands of governance responsibility, such as compliance, accountability and leadership, all of which need to be handled with sensitivity, confidentiality and fairness. Even those governors who were not directly involved in HR in their professional capacity, found that they had gained valuable insights into managing people.

6.2 (b) (x) Risk management

Risk management is central to achieving effective governance. For half of the participants, governance had provided valuable, early experience of this relatively high-level skill. It had also sharpened their awareness of its importance:

“[I] have become better at articulating the case for risk management.”

Risk management in the governance context had promoted a more positive and constructive mind-set for one participant:

“It’s been instructive to see what can and can’t be done – focusing on what can and can’t be changed.”

Awareness of new risks

A number of participants said that being involved in risk management for a different organisation had broadened their perspectives when they came to approaching the exercise in a professional capacity:

“Being on school board has opened my eyes to different types of risk that you wouldn’t necessarily come across in the workplace. It has changed how I recruit to my business, for example, gaps in employment history.”

Others said:

“It has got me thinking about the different varieties of risk – not just the financial ones I’m familiar with in my day to day role.”

“[It’s] helped me to appreciate more clearly where wider risks lie and what can be done to support an organisation going through challenging times.”

“[Risk management] has introduced me to a wider range of risks apart from those just connected to my professional focus in finance i.e. child protection, health and safety, reputation, public sector finance.”

“You get to see different approaches. How a different organisation goes about assessing challenge and risk.”

School governors increasingly regard risk management as a vital function which they must own. Boards that manage schools are ever more accountable and autonomous. School boards are also required to exercise oversight and monitoring across a wide range of fields – more than would be typically and traditionally the case in a corporate setting. This challenges professionals to take into account a panoply of threats and eventualities. As the risks faced in business become equally more wide-ranging, unforeseeable and exponentially damaging, a training ground where employees can sharpen up their mind-set is invaluable.

6.2 (b) (vii) Strategic planning activities

Almost half of the participants said that undertaking the strategic elements of governance had impacted considerably on how they now conducted their professional roles.

Gaining a better understanding of taking a ‘strategic’ stance

Through being a governor many recognised that they had developed a better understanding of taking a strategic outlook for their organisation:

"I have a greater understanding of the role of governance within an institution or corporate or organisation or a school. In my day to day role we focus more on the operational, day to day yet as a governor I've been able to focus more and pick up more on board type skills."

Further:

"Being involved in strategic conversations and planning was a very informative process. It has opened my eyes to be thinking about what are the needs of different groups: for example, the community, the pupils, etc. It has led me to become more involved at work in strategic questions – restructuring, re-organising some of the finances, looking across other departments, thinking about impact."

There were valuable learning points even for someone already taking a strategic stance in their company:

"Strategy and change management is what I do in my main job – but practising it in a different context has been a useful exercise."

Strategic leadership during challenging episodes

Many pointed out that testing episodes that they had encountered in the governor role had stood them in better stead for similar challenges in their professional role:

"Since I've become a governor, the company I work for has been through a restructure. [Similarly] The school has had to change – responding to falling rolls, changing status to an academy. It's been helpful to see parallels in change management strategies across the two organisations..."

Another interviewee said:

"I've learnt a lot through actually carrying out restructuring 'on the ground' – things like dealing with redundancies. It has been a serious and additional responsibility."

The external, governmental pressures with which individuals in school governance are confronted, was a learning point for one participant:

"Stuff comes down from on high – often you are put between a rock and a hard place. Governors find themselves with a lot of work to do as directives are pushed down from government."

Others said that, while strategic planning was not currently a core element of their professional role, they felt that being a governor had prepared

them for a time when they hoped to step up to this type of promoted role within their company:

“I’m not directly involved in planning strategy with my company, but I feel like the skills I have will support me in a future role.”

“Being a governor has enabled me to think and focus on the future. At work much of what I do is short-term project based. Governance allows me to practise planning for three to five years down the line.”

Focus group conversations confirmed that the strategic outlook demanded by governance had had an impact on their perspective and foresight in the workplace; they said they are more likely to think strategically in their day-to-day role and consider longer term eventualities. Even for those employees whose roles do not currently engage with strategic matters, being a school governor has provided an opportunity to exercise a different mind-set; this mental agility would be valuable, as corporates increasingly emphasise the importance of adaptability to meet the challenges of the future.

Most notably, some said the experience of strategic leadership during difficult and challenging episodes had prepared them for similar episodes in a workplace context. In this respect, school governance had provided a powerful learning experience that had equipped employees to take, implement and explain difficult decisions.

6.2 (b) (ix) Developing professional relationships

Fostering strong relationships in the workplace had resulted from operating as a school governor; participants reported that they had approached their colleagues more productively having realised its importance in achieving successful outcomes:

“I’ve had to seek consensus and compromise, tact and diplomacy among a wide range of people. I’ve also had to demonstrate extreme care and sensitivity in how I handle things.”

And:

“I’ve learnt to become more consultative; that gaining a wide range of input on decisions leads to better decisions being made.”

A fuller understanding of the various drivers that motivate people had been a revelation:

“I have a clearer idea of what might motivate different groups, people, and industries.”

This experience had changed another employee’s approach to negotiations in the workplace:

“Helpful to practise negotiating in a new field. Have broadened my experience of negotiation from just commercial negotiations. It’s been helpful to understand some of the different levers that could be used in different types of negotiations.”

6.2 (b) (v) Financial management and efficiency

Nearly half of the participants said they had acquired new financial acumen in the governor role and that this had had a positive impact professionally:

“It’s been really useful to take back learning from my financial work with the school and apply it in my job. I think that’s one of the areas where I’ve seen most development. [For example] I’ve seen that budgets are nuanced, careful pieces of work.”

Some felt that working within the resource constraints of the school system had provided real life experience of financial management:

“Restricted school budgets have provided good practice for the demands of running a small business where budgets are also constrained and upfront investment is difficult to arrange.”

“Understanding school financial data has supported my own understanding of my own company’s accounts, filings and submissions.”

Others felt that they had gained skills in achieving financial efficiency and in determining value for money:

“I have a better awareness of what constitutes appropriate staffing levels and strategies for achieving value for money in a staffing structure. Finding new ways to deliver efficiency and value for money in the staffing structure.”

Support from the school board had been more forthcoming than one participant’s corporate setting, so was a valuable training opportunity:

“I’ve just been given a budget to manage in my professional role so being part of the budget setting process on the governing board has been great. Other board members, particularly chair of the finance committee has been really accommodating – not always so easy to access such support in a professional setting.”

All school governors are expected to fulfil the core role of ‘Overseeing the financial performance of the organisation and making sure its money is well spent’. ⁵ This means that all governors have the opportunity to develop experience in applying key financial principles to the full spectrum of school/MAT resourcing. This training opportunity benefits not only those for

⁵ *Governance Handbook*, DfE, GOV.UK, March 2019

whom financial management per se is an uncharted area, but also those with significant prior financial knowledge in one specialist field only. The opportunity to acquire broader knowledge and practice of financial monitoring will lead to employees having more robust and transferable financial acuity and probity.

Often school governors have the oversight of multi-million pound budgets; this additionally means that the governance role acclimatises employees to step up to higher order accountabilities.

6.3 Attitudes, outlooks acquired through being a governor

Personal attitudes/outlook/behaviours that have developed positively through taking on a governance.

Employees were asked to rate the extent to which they agreed with a number of statements relating to changes in their attitude, outlook since becoming a school governor.

Employees expressed strongest agreement with 6 statements, which can be categorised into two broad areas:

- Adaptability, flexibility and new perspectives
- Personal development and learning

Table 6.3.1 Attitudes, outlooks and opportunities relating to adaptability, flexibility and new perspectives

	Attitude/outlook/opportunity	Score /5
1	Governance has brought me into contact with people I would not normally have contact with	4.7
2	Governance has taught me to adapt to a different setting or environment	4.7
3	Governance has provided me with new and different perspectives from those in the workplace	4.6
4	Governance has raised my awareness of different social and political issues	4

Table 6.3.2 Attitudes, outlooks and opportunities relating to personal development and learning

	Attitude/outlook/opportunity	Score /5
5	Governance has provided opportunities to access training and guidance that would otherwise have not been available	4.1
6	Governance has required me to learn new knowledge that's proved relevant to my professional role	4

Significantly, these attributes are increasingly prominent in corporate messaging about sought after skills and behaviours, particularly those that are linked to organisational values emphasising adaptability, flexibility, a

global outlook and personal development. Some of these are set out below in Tables 6.3.3 and 6.3.4.

One employee reflected on the relationship between workplace practice and the very different context of school governance, and how the role had provided an element of self-challenge and increased confidence through greater breadth of experience:

“I became a governor to experience a workplace outside of my own comfort zone and take best practice from my employer to the role and take best practice back to my employer where appropriate as well as learning a whole new vocabulary and work process and assurance to say the least.”

Another said the need to adapt practice from the workplace to meet the requirements of the governor role provided valuable learning opportunities:

“I have needed to adapt my work methodology and process to match the requirements of the governor role this is why this was appealing as a role as it was a learning process ...”

Taken together, the development of these traits seem to be associated with the emergence of particular qualities associated with leadership; particularly those surrounding emotional intelligence, conscientiousness and openness to new experience.

Table 6.3.3 Adaptability, flexibility and new perspectives in corporate frameworks

Organisation / framework	Statement on skills/behaviours
<p>PwC: ‘The skills we look for: global acumen’, taken from: https://www.pwc.co.uk/careers/student-jobs/apply/the-skills-we-look-for.html</p>	<p>In a continually complex and changing world, you’ll need to operate and collaborate effectively, with a mind-set that transcends geographic and cultural boundaries.</p> <ul style="list-style-type: none"> • Do you consider a broad range of perspectives in your thinking? • Do you embrace and see opportunity in change? • Can you bring fresh insights to our clients and PwC?
<p>Allen & Overy: ‘Refreshingly open, Our values’, taken from: http://www.allenoverly.com/about/Pages/Our-values.aspx</p>	<p>We thrive when we are open with each other, with our clients and to new ideas</p>

<p>KPMG: Demonstrates Curiosity and Innovation, taken from: https://www.kpmgcareers.co.uk/experienced-professionals/applying-to-kpmg/global-behaviours</p>	<p>I am keen to learn and add value by seeking out new insights and perspectives. I demonstrate agility, respond positively to ambiguity and dynamic work environments and embrace and implement change.</p> <p>I develop new ideas, and design and implement practical, relevant solutions.</p>
<p>Lloyds Banking Group: ‘Putting customers first, keeping it simple, making a difference together’, taken from document ‘Our Values in Action’ https://www.lloydsbankinggroup.com/globalassets/our-group/responsible-business/download-centre/helping-britain-prosper-2017/lbg_prosperupdate2017_2017codeofresponsibility_pdf.pdf</p>	<p>I care about customers, putting myself in their shoes and building lasting relationships</p> <p>I have the courage to test new ways of doing things. When I get it wrong, I learn from my mistakes</p> <p>I collaborate within my team and across teams to make everyone successful</p> <p>I am inclusive and I care, valuing everyone’s skills and opinions, and helping everyone to be the best they can</p> <p>I play a part in my community, working with others to help Britain prosper</p>
<p>Accenture: ‘Six qualities of success at Accenture: comfortable with the unknown’, taken from: https://www.accenture.com/gb-en/blogs/blogs-six-qualities-success-accenture</p>	<p>Do you need to know exactly where you will be 1 year from now, or are you comfortable with knowing that you have no idea? One of the constants I’ve experienced during my time at Accenture is change. Things change. A lot. ... I’ll often walk into work with a structured ‘to-do’ list for the day, only for it to go out the window because our project has pivoted to a new strategy. Being cool with change is important here.</p>

Table 6.3.4 Personal development and learning in corporate frameworks

Organisation / framework	Statement on skills/behaviours
<p>PwC: ‘The skills we look for: whole leadership’, taken from: https://www.pwc.co.uk/careers/student-jobs/apply/the-skills-we-look-for.html</p>	<p>We need you to lead yourself and others, regardless of your grade, by making a real difference in the work you do.</p> <ul style="list-style-type: none"> • Do you learn from your opportunities and take the

	<p>time to develop your personal approach to work?</p> <ul style="list-style-type: none"> • Do you lead others to be the best they can be, whether you're part of a team or leading one? • Do you act with integrity and uphold professional standards at all times?
<p>KPMG: 'Strives for continual improvement', taken from: https://www.kpmgcareers.co.uk/experienced-professionals/applying-to-kpmg/global-behaviours</p>	<p>I set and achieve ambitious goals and take ownership of my development and career. I demonstrate learning agility, challenging myself and others to improve. I seek and provide constructive, honest and timely feedback, continually coaching and developing others. I maintain drive and resilience.</p>

7. Employees' increased confidence through being school governors

All the governors who took part in the focus groups expressed a sense that they had grown more confident, in a range of ways, as a result of being a school governor.

This is a powerful finding that demonstrates the reliable and compelling benefits, not only for the employees themselves, but also for employers who sponsor, promote and enable their employees to become school governors.

7.1 Enhanced self-belief and sense of purpose

Many governors referred to an enhanced sense of purpose and self-belief after becoming a governor, which in turn had helped to improve their confidence.

Some participants said that this resulted from providing a valuable contribution in an unfamiliar context:

"My job is something that I can do – I'm used to it. But with governance I've been able to put myself into something that's alien to me yet I can still provide a valued contribution".

Another said:

"[The role] has helped me realise I can add value externally as well as internally. I feel more confident in myself; that I have prepared and know what I'm talking about."

One participant said that the experience led to a re-appraisal of his/her own skills and competencies in light of their new experience:

"Quite often those of us working in a specialist civil service role can find themselves thinking about their skills in quite an insular way. Being a governor can help you to understand that the skills you have are transferrable and can be applied in different settings. That's quite confidence booster. You sometimes don't know you've got those skills until you have to deploy them."

Another participant said that others' perception of governance as being a weighty responsibility had helped to boost their own self-esteem and confidence:

"As I speak to people in the professional world they see that governance is a confidence-building exercise – and that in turn provides me with a sense of confidence."

It is clear from participants' responses that the opportunity to develop high-level skills in the unfamiliar context of school governance had boosted their own self-belief and enhanced the perception held by others of governors' capabilities and competences.

7.2 Learning to be assertive, and thinking on your feet

Many said that the need to be assertive in the governor role had boosted their confidence in their professional sphere.

One participant in the focus groups said that they had gained a lot of "personal confidence" and as such, felt "much more prepared and ready to meet new customers".

One participant explained:

"You go into a room full of people you don't know and carry out a role with quite clear responsibilities. That's quite powerful – and it challenges you to do that in the workplace. How to operate and engage with different people. You're learning how to have robust conversations with forward and back."

Another said that the experience of dealing with "other outspoken governors" in the board setting had increased their confidence.

One participant said that the need to evaluate and challenge a wide range of information, often straight away, had had a positive effect on their confidence in the workplace.

Another said the role:

“Has helped me to think on the spot, process things more quickly... My team has been growing at work – my board experience has definitely helped my ability provide leadership and drive accountability across a large and diverse group.”

One governor explained that a greater sense of confidence had been developed through *“learning about a new topic and having to ask questions about it”*, adding:

“Developing that understanding helps you to feel more confident, that sense you can think on your feet.”

Others cited the need to provide effective challenge – that is challenge delivered non-defensively, non-confrontationally and constructively – as the catalyst behind an increased sense of confidence. One governor remarked that s/he felt:

“... better able to ask questions in a non-combative way. I have learnt to take the lead in meetings and be clear about what I want to see. For example, which data I would like to see, which teachers I need to talk to...”

As shown by participants’ responses, the need to provide robust accountability, despite inherent barriers (e.g. lack of time, unfamiliarity with the subject matter, working with a large and diverse group of people, maintaining supportive relationships), had challenged governors to perform the role with some assertiveness which in turn had boosted their confidence.

7.3 A sense of achievement through carrying out specific roles

A tangible sense of achievement through completing a specific role or task had been the source of increased confidence for some governors.

For example, one participant remarked that it was through the inspection process that a real sense of what s/he had given to the school became evident, and it was this that had led to a new sense of confidence:

“Ofsted came in in January and they said there was a good level of challenge visible within the minutes.”

Another participant remarked:

“I have gained self-confidence and also a sense of achievement – I’ve supported the school through some big changes.”

The feeling of being involved in and contributing to a successful project provided clear and demonstrable evidence of the value-added they had given the school and this boosted their confidence.

7.4 Formal experience on a board

Some said they gained confidence through engaging with senior management on more strategic matters.

One participant said that the role did take some getting used to, but s/he was quickly able to *find my feet in a board context*:

“Took me a few meetings to gain confidence and raise my voice. Understanding other members – particularly those who have a lot to say. Now feel much more confident asking questions.”

One participant remarked that in terms of confidence:

“... it has given me a sense of different levers I can use in a board context and better understanding of the strategies of challenge.”

Another said:

“... it's allowed me to do is to engage better with the trustees I work with already. My role has always been partly strategic and partly operational, but I now have a clearer sense of what trustees do, and what they want to see in their role.”

These participants gained a definite sense of confidence from the role's high level responsibilities, including the need to think strategically and engage confidently with senior management.

7.5 Conclusion

All participants agreed that taking on the school governor role had boosted their confidence. Increased confidence had been grounded in the proven self-belief that they could function quickly, effectively and assertively in an unfamiliar, high-level and challenging setting without being over-awed. Their self-esteem was further boosted by the respect they attracted from others.

These reported experiences show that governance provides valuable preparation for younger employees who have not yet interacted at board level in a professional sphere but who have aspirations and latent capabilities that can come to fruition through planned career development right up to CEO level. Other employees could transfer their governor experience to a non-executive director role.

8. A professional development matrix: a tool to align the skills developed through school governance with skills employed in the workplace

During the focus group discussions participants' views were sought about a matrix that would show where skills developed through governance are transferable to the workplace.

The primary purposes of such a tool would be to:

- Encourage self-reflection;
- Clearly articulate the value of being a governor;
- Categorise evidence of professional skills' development through governorship and
- Use it as the basis of a dialogue about how an employee may progress and develop in their workplace role.

The matrix tool that was shown to participants was an early draft and was presented as such in order to generate opinions and recommendations.

14⁶ out of 15 participants endorsed the principle of such a matrix and said that they could see themselves using such a tool.

Participants also had helpful views about its specific use (8.1-8.4) and its design (8.5).

8.1 A self-reflection matrix

Some respondents said that the matrix would act as a useful reminder and codifier of the skills they employed and developed as a governor. Governance involved using a range of interlocking skills which needed to be teased out separately and recognised:

“Often when you're in the midst of governance it's hard to recognise the skills you're using.”

Another said that sometimes:

“... you forget the skills that you are learning or developing so just having them there to remind you would be very helpful.”

The matrix would help them to reflect on their own development and support their own self-evaluation:

⁶ The fifteenth governor did not engage with this question.

“It would be helpful in assisting me to pull together and articulate my own thoughts and I would definitely find it useful as part of a self-evaluation exercise.”

8.2 In a career-development dialogue: a specification, with evidence, of the benefits derived from being a school governor would be supportive

Some participants said that the matrix would help them to articulate their development as governors in conversations with line-managers or career coaches – in other words, those with an influence on employees’ professional growth.

One said it:

“... would be very useful as a prompt to talk about skills with my career coach.”

Another said that

“The matrix would certainly help me to put forward a commentary on the skills I develop as a governor. My work is interested in what I do as governor so this would be a good way of demonstrating the benefit.”

The expectations of the employer encouraged one respondent to engage further with the role:

“I do mention things that I have done on the governing board in an appraisal situation; this is time that is sponsored by my company so it’s important to make the most of it.”

A final participant said that the matrix:

“... would certainly help me to articulate some of the skills I’m learning outside the workplace.”

8.3 Governors’ engagement with the developmental opportunities offered by the role can increase

Some participants pointed out that the matrix could help governors to navigate the breadth of the role and as such, engage them more proactively in the developmental opportunities offered.

One participant commented that, in analysing the range of developmental benefits derived from being a school governor, some volunteers might see the huge benefits of remaining as a co-opted (non-executive) governor after their elected governor role (often as a parent) had expired:

“... might help to ensure some governors engage more fully with the role – convert those originally there for a singular reason (as a parent of a child in school) but who come to see wider benefits.”

This participant added that:

“Many of the better governors I know perhaps started off like that but came to see the wider benefits of being a governor. They came to feel like they were getting something more from the role. It’d be good to tap into that and promote it.”

Another participant in the focus group said that individuals could use the matrix to ask themselves:

“... am I making the most of this role? Am I taking part in the full range of tasks that governors carry out?”

8.4 A governor recruiting tool

Some participants remarked that the matrix could help to recruit governors as it explains elements of the governor role and the transferable skills it engages and develops.

In particular, some participants noted that the governor role is often misunderstood and as such, the developmental benefits are not fully recognised.

One participant said it would:

“... be useful as a recruitment tool as there is a lot of misunderstanding about the role of a governor. Many think that is similar to a PTA role.”

Another added that it:

“... would be very useful a lot of people don’t know what school governance means and how it can build skills... [it] would help to promote governance as well as focus peoples’ minds on skill development.”

8.5 Matrix design considerations

Some participants reasonably said that the skills included within the matrix tool would affect its overall applicability. One participant remarked:

“Some of the points are not captured within the matrix as it currently is, and some are too granular. But I think it is a useful reminder of the skills you are using.”

Being “*too granular*”/too detailed could be disconcerting or render the tool too difficult to use:

“It feels quite complex – lots of information to take in at first glance.”

Another said that it would be difficult to create a universal tool that would be relevant and current to individual corporate frameworks:

“I agree that a tool would be useful which but challenge would be in securing alignment to a corporate skills framework.”

A formal recognition of skills gained outside of the workplace might need feedback from the Chair of Governors.

8.6 Conclusion

The vast majority of participants agreed that a skills-development matrix would be a helpful career-progression aid and that they could see how they would use it as evidence of the benefits derived from their governance experience.

Consideration would need to be given to its construction, possibly in concert with corporates who would welcome its integration into their own employee-development frameworks.

9. Research conclusions

The very significant finding from this survey is that anecdotal evidence has been substantiated by findings through quantitative and qualitative data collection. Employees’ experience is that many of skills they use and develop as school governors – particularly high-level strategic and leadership-type skills – were highly transferable back to their professional roles.

This is something which has been under-recognised in the past, where messaging has tended to emphasise a one-way flow of expertise from governor bringing specific professional expertise to a school board, rather than something more symbiotic.

Employees understandably report strong development and growth in specialist areas they may have been previously unfamiliar with, such as education and pedagogy and legal knowledge. More significantly, however, they say they have developed particularly strongly in those high-level strategic and leadership-type skills that they also said are the most transferable to their professional role: strategic planning, leading persuading and influencing others, asking challenging questions, and finance and value for money.

Furthermore, being a school governor encourages a mind-set ready for accepting and managing challenge. Governors said they felt more confident and assertive, enabling them to operate more effectively, particularly in a context which is unfamiliar.

These findings have significant implications for employees' development. Being on a school governing board is undoubtedly a setting in which to use and develop strategic and leadership expertise. Hence taking on a school governor role has the potential to provide a professional development pathway, complementary and parallel to that offered in the workplace.

School governance can provide an important element of talent development programmes, for those being prepared for senior management positions, right up to CEO level. Equally, with people living longer, and moving roles and jobs more frequently, the skills developed through school governor experience provides an excellent grounding for employees as they progress through these changes in their working lives.

9.1 Next steps for Governors for Schools

For next steps, Governors for Schools will:

- Share these findings with the Learning and Development teams of Governors for Schools' existing and emerging business partners
- Advocate for the professional development resulting from volunteering as a school governor to be recognised in conversations about individuals' progress and development, and, more broadly, to become an important element of talent management programmes.
- Develop an online tool to track and recognise employee's governor activities and development they have experienced, building from the prototype skills matrix created through this research. This will make it easy for employees to demonstrate learning and development to their employers.