THE **LEARNING** PARTNERSHIP

Formerly - The Learning Alliance

2022-23

Trustee and Governor Equality and Diversity Survey

Summary Report

Report Published April 2023

TLA Governance Equality and Diversity Survey 2022

Context

1. The Learning Alliance (TLA) is Cheshire and Staffordshire-based multi academy Trust comprising of a family of nine schools. There are three primary phase schools, four secondary schools a studio schools and a University Technical College.
2. The TLA is fully committed to its public sector equality duty obligations to promote and secure a diverse representation within its Trustee and Governor volunteer base.
3. In the autumn of 2022 the TLA Trust Board, through its Governance Committee, committed to undertake an equality and diversity review of volunteers across the TLA.
4. A data collection exercise was undertaken during November and December 2022. Participation was voluntary, although all Trustees and Governors were invited and actively encouraged to participate.
5. The data was collected via the completion of a MS Forms survey that included a set of multiple-choice questions. These questions were based on similar questions to those used by the National Governance Association (NGA). This was deliberate, as it would offer an opportunity to benchmark results against the NGA's national findings.
6. All responses received were managed as confidential. Respondents, when completing the survey were only asked to voluntarily provide their initials rather than their full names.
7. When commissioning the work, Governance Committee was mindful that the small data sample sizes coupled with the sensitive nature of the information would mean that any results delivered would be presented mainly as Trust-wide outcomes.
8. Throughout this report, the terms "the Trust" and "volunteers" represent both Trustees and Governors. Where outcomes are available at a level other than Trust-wide, the terms Trustee and Governor are used.

Key findings

9. There was a high response rate to the survey (75%), with representation secured from across all parts of the Trust, thereby providing confidence in the response data.
10. There is a broad gender balance across the Trust, with a few more male than female volunteers. Males are less likely to govern on a primary school Local Governing Board (LGB).
11. There is a broad distribution of ages across the Trust <u>above</u> the age of 40. However, there is a lack of volunteers under 40, especially within the secondary school LGBs. The Trust should actively seek to attract more volunteers under the age of 40 to support succession planning and increase the diversity of experience from this segment of our communities.
12. There is very limited evidence of diversity with respect to ethnicity and, consequentially, the volunteers are more likely to have English as the primary language within the household. All respondents identified their first language as English and more than 96% self-declared their ethnicity as "White British". The current make up does not reflect, nor mirror, the diversity within the school (pupil) communities that we support.
13. Less than 5% of respondents declared a disability. Those that did also indicated that adjustments were not required.
14. The Christian faith is well represented (60%) across the Trust and within each school. Other faiths made up 6% of the responses.

15. Volunteers reside close to our schools. More than four fifths of volunteers live within five miles, or 10 mins drive, of their school. Only 3% reside more than one-hour travel time away.

16. The responses indicate that the Trust has good levels of parental representation. Parents (or grandparents) with children in our schools make up almost one third of the volunteers.

17. Trust governance is well served with experienced volunteers. Individuals with 5 or more years' governance experience account for 57% of all responses, whilst 25% of the overall respondent population each bring 12+ years' experience.

18. Retention of volunteers should remain a priority. Whilst 58% indicated a willingness to serve in two years' time, a further 30% (16 volunteers) were undecided or not committed. These 16 volunteers included six volunteers who are currently in the 40-49 age bracket, and six who are aged 60+.

Priority actions and outcomes arising from this work:

19. Recruitment to focus on increasing the actual number of volunteers under the age of 40, particularly within secondary schools.

20. Recruitment should focus on increasing the ethnic diversity across the Trust and within the LGBs so that ethnic diversity reflects a position that is closer to the diversity found within our local communities and pupil demographics.

21. Recruitment materials should be adapted to highlight and welcome applications from people with a disability and non-white British candidates. Consideration should be given to ensuring that the information is accessible to the under-represented groups. This could include the format, language(s) and platform(s) used.

22. Governor retention should seek to maximise the continuation of governors who are planning to exit or remain undecided about continuation in two years' time.

23. An action plan is included in Annex A to this report. A copy of the sample questions used is included as Annex B.

Summary of Responses

24. Responses were secured from 53 Trustees and Governors. This represented just over three-quarters of all volunteers serving with the Trust. The distribution of these responses is provided in Chart 1.

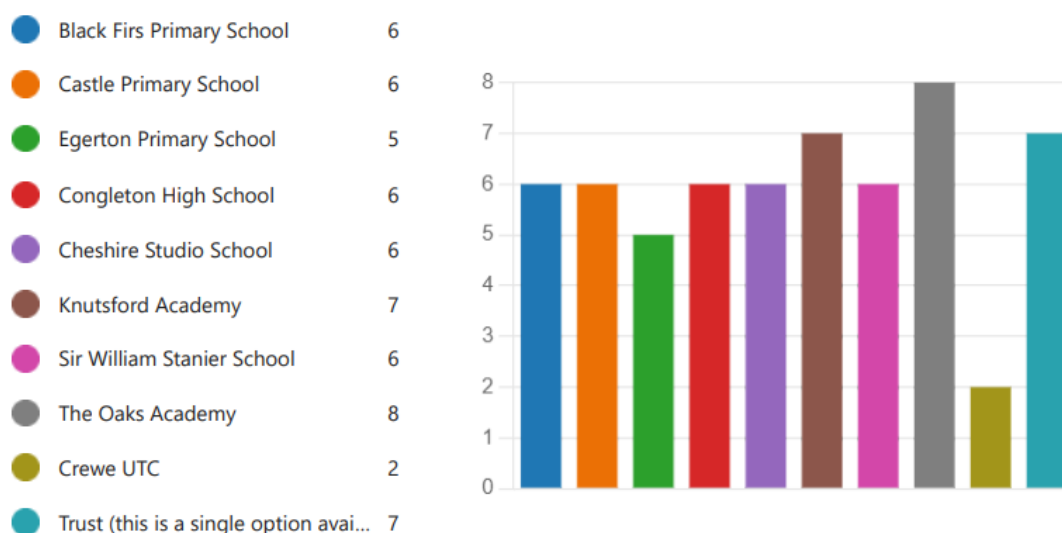|		
🔵 Black Firs Primary School	6	
🟠 Castle Primary School	6	
🟢 Egerton Primary School	5	
🔴 Congleton High School	6	
🟣 Cheshire Studio School	6	
🟤 Knutsford Academy	7	
🩷 Sir William Stanier School	6	
⚫ The Oaks Academy	8	
🟡 Crewe UTC	2	
🔵 Trust (this is a single option avai...	7	

CHART 1 : Distribution of Responses by School

25. With the exception of the one school responses rates were above 67% for all schools. Trustees and two schools provided a 100% response rate.

Gender

26. The Trust has a reasonable gender balance, with a slight weighting towards males. 43% of respondents (23/53) were female. Table 1 breaks this distribution down further by the educational phase that is supported.

	Primary	Secondary	Total	
Female	10 (59%)	11 (38%)	21	52% of female governor population serve on primary LGB
Male	7 (41%)	18 (62%)	25	28% male governor population serve on primary LGBs
	17 (100%)	29 (100%)	46	
	59% of primary LGB governors are female	38% of secondary LGB governors are female		

TABLE 1: Gender distribution of LGB governors by phase

27. Female governors are distributed fairly evenly between primary and secondary schools LGBs.

28. Male volunteers are almost three times more likely to undertake a governance role within a secondary school. The balance of primary and secondary schools in the Trust results in secondary school LGBs typically having around twice as many males as females on their LGB.

29. The gender balance within the Trust Board is less balanced, with males accounting for more than two thirds of the Trustee membership.

30. In terms of leadership opportunities, four LGBs have a female Chairs and five LGBs have a male Chair. A similar pattern exists for Vice-Chairs. At Trust level, there is an even gender distribution across the Chairs of the Board and its three committees.

Age

31. There is a broad distribution of volunteer ages across the Trust.

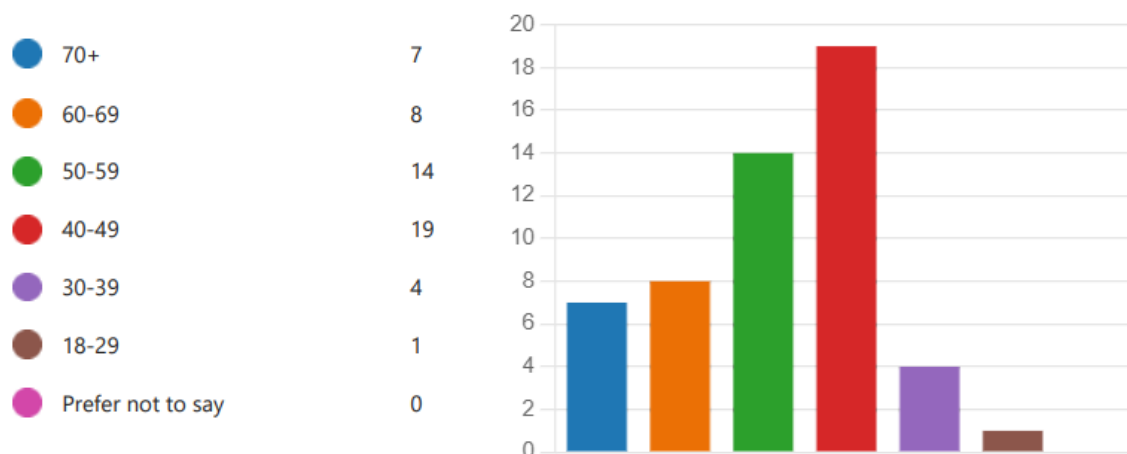|		
● 70+	7	
● 60-69	8	
● 50-59	14	
● 40-49	19	
● 30-39	4	
● 18-29	1	
● Prefer not to say	0	

CHART 2: Distribution of volunteers by age

32. The peak age profile of volunteers is found within the 40-49 year old bracket and this accounts for 36% of all volunteers. More broadly, 62% of volunteers are within the 40-60 year-old age range, with a further 28% aged 60+. The number of volunteers below the age of 39 is low, (10%), and the vast majority of these younger governors contribute as primary schools' LGBs' governors.

33. The challenge of attracting younger governors has been identified as a national issue. The National Governance Association Annual survey for 2022 highlighted that the percentage of governors and trustees below the age of 40 is the lowest on record, currently 6%, and those under the age of 30 remains at 1%. It also indicated that nationally 51% of volunteers are now aged 60+. The corresponding value for this latter figure within the TLA is 28%.

34. Whilst the Trust's relative performance appears slightly better than that outlined by the NGA, the Trust should recognise the ongoing importance of attracting volunteers under the age of 40. This challenge should not be underestimated. The Trust should consider what actions could be taken to secure the recruitment of younger volunteers into LGB governor positions. This will contribute towards effective succession planning and mitigate risks

associated with natural loss and turn-over often seen within older volunteers. Securing ways in which to address the deficit of younger governors in secondary schools should also present an opportunity to improve the age profile distribution.

Disability

35. Only 4% of respondents declared a disability. This value can be contrasted with the pupil demographics across the Trust where around 10% of pupils are identified as SEND, and the ONS/UK Government 2019 national statistic[1] of 9% of school age pupils or 21% of working-aged adults. Whilst the demographic distribution of SEND pupil varies considerably between Trust schools, the limited sample size does not enable the volunteer analysis to be secure at a level lower than whole Trust. Nevertheless, it does suggest that there is significant under-representation within our volunteers, and that action should be taken to address this.

36. The respondents that did declare a disability also indicated that no additional adjustments were needed to enable them to discharge their responsibilities. Given the low numbers of volunteers with declared disabilities, then it would be prudent to include positive statements that encourage and welcome volunteers with disabilities when governor recruitment opportunities arise and are promoted.

Sexual Orientation

37. 92% of respondents declared their sexual orientation as "straight/heterosexual". In 2016, the ONS estimated that 2% of the UK population, or just over one million people, identify as having a minority sexual orientation[2]. Results recently published from the 2021 census indicate that 91.5% of people within Cheshire East identify as heterosexual. No course of action is proposed here at this time, other than to continue to monitor the position in future surveys.

Ethnicity

38. Respondents were invited to use the "self-definition of ethnicity" (SDE 18+1 codes) to define their ethnicity. More than 96% identified as "White-British". Cheshire East has very limited ethnic diversity within its population with nearly 94.6% identifying their ethnicity as "White"; this 2021 census figure is almost 13% above the average for England. However, within Cheshire East there is significant variance, with the wards of Crewe South and Crewe Central being the two most ethnically diverse wards in the East Cheshire, each with 21% non-white British, as identified in 2011 census[3].

39. Whilst the Trust-wide volunteer profile appears to be aligned to the ethnic characteristics of Cheshire East, the variance of ethnic diversity across communities in Cheshire East requires the Trust further consideration to ensure that we have appropriate representation from our local communities.

40. Within the geographical footprint of Trust there is evidence of considerable variation in the ethnic background of our communities, demonstrated by our pupil profile. Across the Trust around 8% of our pupils do not have English as their first language, although the distribution range varies from 2% to 26% in our schools. Diversity is seen greatest within the Crewe-

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[1] UK Government/ONS Family Resources Survey: financial year 2020 to 2021
[2] UK Government Equalities Office: National LGBT Survey: Summary report 2019
[3] Cheshire East Council Borough Profile (2019-20) data pack

based schools where the range varies between 16% and 26%. Here diversity is expressed predominantly through white Eastern European family heritages.

41. Due to the relatively low numbers of individuals that make up the composition of an LGB and/or Trust Board (with the consequence of each respondent would equate to a double-digit percentage value) it is challenging to monitor and develop actions at a level below that of the Trust. Nevertheless, positive action should be taken to increase the diversity within the ethnicity profile of volunteers with the Trust.

42. The demographic data suggests that implementation of Trust-wide actions should be prioritised towards delivering outcomes that increase the LGB diversity within the Crewe-based schools. In addition, the lack of ethnic diversity amongst Trustees should also be factored into any future Trustee appointments.

Religious Beliefs

43. Christian religious beliefs were expressed by 60% of respondents. Other faiths and religions were represented by 6% identifying with other religions, whilst 32% indicated that they did not hold religious believes. All schools were found to have LGBS with governors that expressed religious beliefs. Census 2021 data recently published by the ONS indicated that the 59.3% of the population of England and Wales declared Christian religious faiths whilst 25.2% declared no religious faith. No course of action is proposed here at this time, other than to continue to monitor the position in future surveys.

Locality and Accessibility of Volunteers

44. The vast majority of volunteers (83%) (trustees and governors) live within 5 miles or 10 mins drive of the school. Only three volunteers resided more than one hour travel time away from our schools (see chart 3 below) . This suggests that our trustees and governors will understand aspects of the local context within which the schools are operating.

45. The Trust seeks to secure local representation and parental representation through its LGB membership. The LGB terms of reference include a minimum expectation of two parent governors on each LGB (which is typically 20-25% of the LGB). Whilst the survey didn't explicitly seek data on the number of appointed parent governors (since this can be obtained from other sources), it did seek to secure information on the number of volunteers with children/grandchildren attending a school within the Trust. This approach was taken to act as a proxy for understanding and actively representing the local communities.

46. The survey replies indicated that 32% of volunteers are either a parent governor or have a child/grandchild within our schools. This suggests, albeit with the caveats for the need to diversify the volunteer base further, that those who already volunteer, have an interest in, or are a stakeholder of, the community served by the School and Trust.
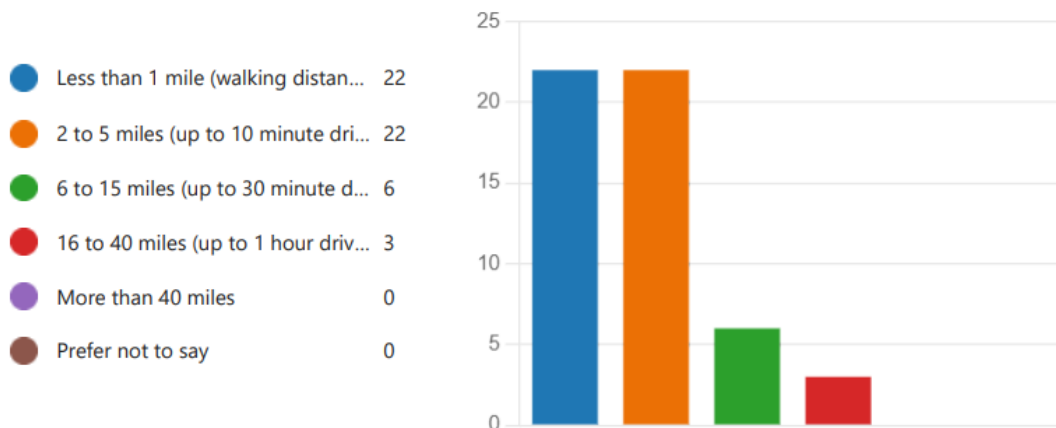
● Less than 1 mile (walking distan...	22
● 2 to 5 miles (up to 10 minute dri...	22
● 6 to 15 miles (up to 30 minute d...	6
● 16 to 40 miles (up to 1 hour driv...	3
● More than 40 miles	0
● Prefer not to say	0

CHART 3: Locality of Volunteers

Governor Experience and Future Intentions

47. The Trust has considerable governance experience contained within its volunteer base.

48. All volunteers indicated that they undertook further study after school either as Higher (74%) or Further Education (26%). This suggests a well-educated volunteer group, who can relate to the opportunities afforded by education.
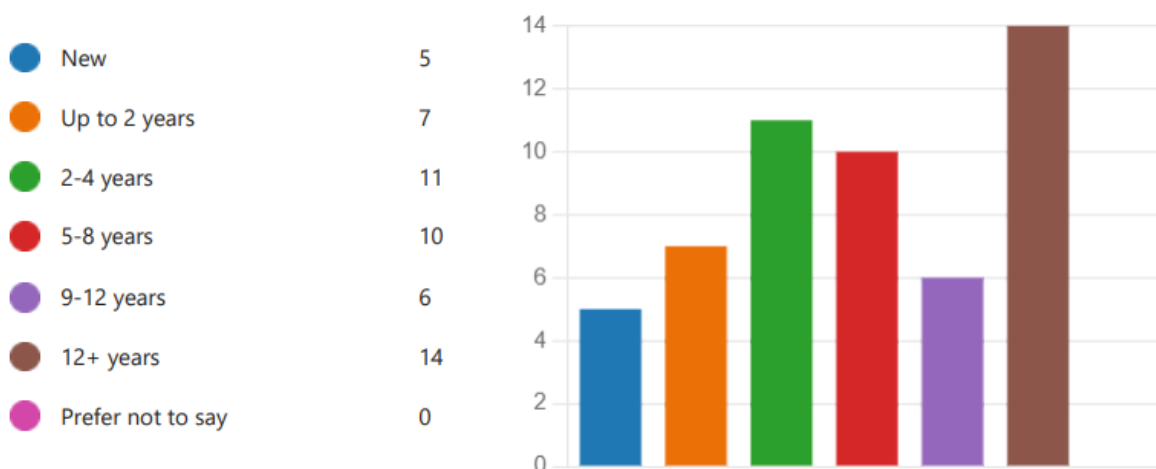

● New	5
● Up to 2 years	7
● 2-4 years	11
● 5-8 years	10
● 9-12 years	6
● 12+ years	14
● Prefer not to say	0

CHART 4: Governor Experience

49. There are 20 volunteers (38%), distributed across the trustees and schools, who each offer more than nine years' experience of governance. Only two school LGBs don't include any governors with more than nine years' experience, although within these two schools there is a reasonable depth of experience within the governors.

50. Across the Trust, 12 volunteers (23% of respondents) have less than two years' experience as a governor. These inexperienced governors are distributed equally between primary and secondary phases. One school (with four inexperienced governors) and another (with three) each offset this inexperience by having have four and two governors respectively, with more

than 9+ years' experience. Across the Trust, Chairs and Head-teachers need to ensure that experienced governors are used to support the development of less experienced governors.

51. The survey invited volunteers to offer an indication on their intention to continue serving as governor or trustee in two years' time. 58% of respondents replied positively, indicating that they would continue to serve beyond two years. Whilst 9% (i.e. five people) expressed a definitive intention to step down, a further 30% (12) were unsure or undecided on their intentions.

●	No	5
●	Possibly/ don't know?	16
●	Yes	31
●	Prefer not to say	1

CHART 5: Governor & Trustee intentions to continue after 2 years

52. Of the 16 volunteers who indicated that they were unsure of their intentions in two years' time, half (8) currently hold more than nine years of governor experience. Six of the 16 volunteers are currently aged under 50 and six are aged 60+. Two thirds of those unsure are male.

53. Within the overall survey population there were 12 respondents who had been in role for less than two years. Notably only two of these indicated that they were planning to step down in two years' time.

54. At the individual school-LGB level, the patterns of future intentions are less predictable. Three schools in the Trust each included three governors who did not return a positive intention to continue. Whilst the majority of these are undecided, there is an opportunity for the Trust, the school(s) and the LGB to create an environment that will encourage volunteers to remain in post. This will ensure that the skills and experience already gained can be utilised. However, it is acknowledged that life events affecting the volunteers will impact on some people's ability to make the necessary commitments required from a governor.

55. 11 volunteers with more than nine years of governance experience returned a positive indication that they expected to remain active in two years' time. This is welcomed, especially since the majority of these continue to offer the greatest level of governance experience across the Trust.

56. However, longevity of service can also be associated with risk, particularly where service is contained exclusively within a single school. Therefore, consideration should be given to exploring ways in which long-serving governors who wish to remain active in their contributions might be utilised across other schools within the trust. This could take the form of either changing the LGBs on which they serve or undertaking cross-trust or cross-LGB activities. Beyond this survey, there is evidence that the latter is already taking place, with examples including LGB Chair mentoring, peer observations of LGB meetings, and cross-membership on specialist LGB governor panels (such as Pupil Exclusions reviews).

Conclusion

57. There has been positive engagement with this work across the Trust, and the relatively high response rate provides an authenticity with the data that can be used to support planning activities and actions. The relatively small data sample sizes involved does restrict the ability to drill down to provide an individual LGB or school-level analysis. However, Trust wide actions can be identified and locally these can be considered for adoption and implementation.

58. There are a number of immediate actions that the Trust can consider. These fall mainly within two broad themes.

    a. The first is to focus on trying to ensure that the volunteer profile is more inclusive and representative of the communities that it serves. Positive actions to secure volunteers from wider ethnic backgrounds and also from a younger age demographic, particularly under 40 years old ,may help encourage this.

    b. The second is to identify opportunities and activities that will support retention of current volunteers. This will consolidate the investment in time and skills development for both the Trust and the volunteer that has already taken place. These opportunities may need to extend beyond the LGB that the governor is currently involved with.

59. The exercise has demonstrated good engagement from our volunteers. It is recommended that it should be repeated periodically (e.g. every 2- 3 years) and that within the intervening period, that data is captured from governors upon appointment and or renewal.

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Annex A : **Trust Action Plan:**

1   Trustee Recruitment:

    a)   Governance Committee to undertake search-related activities to extend ethnic diversity within Trustee membership.

2   LGB Recruitment:

    a)   Central Governance Team to review existing governor recruitment materials used by schools and develop appropriate templates.]

    b)   Central Governance Team and other Central Services Team to work with Crewe Schools / LGB to develop marketing collateral that can promote governor opportunities to wider ethnic groups

    c)   LGB Chairs to actively consider age and gender composition alongside skills requirements when nominating or identifying potential (non-parental) governor candidates.

    d)   Central Governance Team to incorporate EDI questionnaire into governor appointment and renewal process.

3   Governor Retention:

    a)   LGB Chairs to identify opportunities to utilise the skills and experience of longer serving governors to support induction of new governors (e.g. mentoring and shadowing)

    b)   Central Governance Team to work with LGB Chairs to offer cross-trust and cross-LGB opportunities for experienced governors.

    c)   LGB Chairs to identify longer serving governors prepared to support other trust schools

Annex B : **Trustee and Governor Diversity : Data Collection Framework and Questions Set**

1 Purpose

A diversity of thought, voices and perspectives is essential to good governance and the effective running of any organisation. This form is designed to gather information for the purpose of <u>diversity monitoring</u>.

A strategic approach to diversifying the governing boards is both setting an example and demonstrating the board's commitment to achieving diversity and equality at all levels of the school/trust.

The purpose of diversity monitoring is not to promote token diversity – no formula is being applied to determine a representative governing board. We are guided by benchmarks from NGA and national trends and concerns about lack of diversity in governance. Trustees and members of the governing boards are not recruited solely on the basis of their protected characteristics or lived experience. However, we do recognise the value of being able to understand and represent the communities that we serve.

2 Participation

The Trust places great value and importance on diversity. It encourages all Trustee and Governors, who we recognise as volunteers, to participate in this exercise. The questions and answer options have been constructed so that there is a response option which enables you to opt out of a providing an answer to any individual question.

The completion of the survey is voluntary, although strongly encouraged.

3 Anonymity verses confidentiality

Given the sensitive nature of the questions we have carefully considered whether to conduct the exercise as an anonymous survey. We have sought to weigh up the benefits of being able to undertake meaningful comparisons, within and across the Trust and schools, including the ability to compare governance with similar data on employment and pupils.

We have concluded that because equality and diversity is an important and ongoing priority, then monitoring should not be viewed as a one-off exercise. There are important insights and benefits to be gained from understanding changes over time.

Therefore, we are approaching this in a manner similar to that used in employment, capturing equality and diversity information, and therefore we invite you to include your name. However, we respect your right to withhold your name and have included an option to enable you to do this.

It is the intention that we invite all new Trustee and Governor to complete this survey upon taking up their appointment.

4   How your data will be handled

The survey will be conducted confidentially. Your data will be held securely on a Trust database which has access restricted to the Clerk, Director of Quality and COO.

Your data will be used to provide statistical summaries of diversity across the Trust and its schools. We recognise that some analysis could result in sample and response sizes that are low, the result of which could compromise anonymity. In such cases, data will be redacted, even in summary form. The definition of threshold will vary, but will normally be set at either 3 responses or 15%, although in some cases it may be appropriate to set the threshold at a different, typically higher level.

Applying a threshold constraint might result in some analysis being unavailable at an individual LGB or Trust Committee level. In such cases analysis is likely to be restricted to Trust-level.

5   Proposed Question Set with Answers Options

This question and answer set prepared below has been derived from the NGA Governance Survey Questions.

No	Question	Answer Options
1	Which School(s) are you associated with? *Please tick all that apply.* *Trustees should only select Trust.*	BFPS; CPS; EPS; CHS; CSS; KA; SWS; TOA; UTC; Trust
2	What is your Gender?	Female; Male; Other; Prefer not to say [Prefer to comment here]
3	On your last birthday, which age group did you fall within?	70+ ; 60-69; 50-59; 40-49; 30-39; 18-29; Prefer not to say
4	Do you have a disability?	I have a disability and require additional support and or adjustments in order to fully participate as a member of the governing board I have a disability but require no additional support and or adjustments in order to fully participate as a member of the governing board I do not have a disability Prefer not to say [Prefer to comment here]
5	Which of the following best describes your sexual orientation?	Bisexual Gay/lesbian Straight/Heterosexual Prefer not to say [Prefer to comment here]

	(Sexual orientation is one of the characteristics that are protected by equalities legislation. This data will allow the board to reflect on how its composition reflects society as a whole and the insight required in order to ensure that practices in the school/trust are inclusive)	
6	What is your ethnic Group ? *(Ethnic origin is not about nationality, place of birth or citizenship. It is about the group to which you perceive you belong)* *Self Definition of Ethnicity is used (SDE code, often referred to as SDE 18+1 codes)*	**White** W1 – British W2 – Irish W3 – Gypsy or Irish Traveller W9 – Any other White background **Mixed or Multiple ethnic groups** M1 – White and Black Caribbean M2 – White and Black African M3 – White and Asian M9 – Any other Mixed or Multiple background **Asian or Asian British** A1 – Indian A2 – Pakistani A3 – Bangladeshi A4 – Chinese A9 – Any other Asian background **Black, Black British, Caribbean or African** B1 – Caribbean B2 – African B9 – Any other Black, Black British or Caribbean background **Other ethnic groups** O2 – Arab O9 – Any other ethnic group **Not stated** (Prefer not to say) NS – Not Stated
7	What is your religion?	Buddhist Christian (including Church of England, Catholic, Protestant and all other Christian denominations) Hindu Jewish Muslim Sikh No religion Prefer to comment here [insert comment] Prefer not to say
8	Is English used as the native tongue in the household?	No Yes Prefer not to say

9	How close do you live to the School or Trust where you govern? *In the case of Trustees, then distance would be to the nearest school.*	Less than 1 mile (walking distance) 2 to 5 miles (up to 10 minute drive) 6 to 15 miles (up to 30 minute drive) 16 to 40 miles (up to 1 hour drive) More than 40 miles Prefer not to say
10	Are you a Parent Governor or do you have a child in school currently?	No Yes Prefer not to say
11	Did you continue your education after leaving school?	Further education Higher education An apprenticeship route I did not continue my education Other: I would prefer to comment [insert comment] Prefer not to say
12	How many years' experience do you have as a governor or Trustee *(at any school or MAT)* ?	New Up to 2 years 2-4 years 5-8 years 9-12 years 12+ years Prefer not to say
13	Do you anticipate remaining as a Governor / Trustee in 2 years' time? *The purpose for this question is about perception and to assist in succession planning. It is not seeking a commitment from you at this time*	No Possibly/ don't know? Yes Prefer not to say
14	If you are prepared to share your name please provide	[Insert name] Prefer not to say

END