Guidance Note: Trust Governor Users, User rights and document control

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The Trust Governor is an online resource used across all Catholic schools in the Diocese of Nottingham to support effective governance. The system operates at three levels; across all schools in the Diocese, across each of the four separate Catholic Multi-Academy Trusts (CMATs) and at individual school level.

For the system to function and serve the needs of the NRCDES, the CMATS and all 84 Catholic schools a small number of guiding principles need to be borne in mind by all users. In particular it is important to consider:

- o Who needs access to the system?
- o What access level do users need?
- o How can we maintain control over document uploads?

User Access

The Trust Governor is a system for governors. So considerable thought should be put to who, other than foundation and parent governors, should have access to the system.

However, there are others that do not fall into those categories who will need to be system users:

- CMAT level access: CMAT Executive Team, Governance Lead, CMAT Directors
- School level access: Clerk, Headteacher, Associate Member, other school staff with specific responsibility for supporting governance * (see below for advice)

*access to The Trust Governor for school staff should always be carefully considered before it is granted. There should always be a clear justification for the staff member to have access. A member of staff who is going to be 'in attendance' at a local governing body meeting does not require access to the system. The usual reason why a staff member other than the Headteacher is granted access to the system is because they have been delegated responsibility for ensuring that school level documents have been loaded onto The Trust Governor system. It is therefore quite common for a Deputy or Assistant Headteacher or the school office manager to be given such duties; however, good practice would be to be clear who has access and to limit access to one or at most two staff members.

If schools have any doubt on who should have access they should contact a member of the NRCDES Governor Support Team (details below).

Access Level

The Trust Governor provides for users to have different access levels:

- 'governor' - standard access level allowing users to manage their profile, view meeting details and school/CMAT policies and documents.
- 'governor + docs' - additionally allows the user to load documents onto the system
- 'LGB Admin' – additionally allows the user to set reset user passwords, arrange meetings, add new users, change user access levels for their LGB
- 'System Admin' - additionally allows the user to undertake the LGB Admin level functions across all schools in the CMAT

User type	Access Level
Governor (foundation/parent)	Governor
Associate Member	Governor
CMAT Director	Governor
CMAT Executive	Governor + docs
Chair of Governors/Vice Chair	Governor + docs
Clerk	LGB Admin
Headteacher	LGB Admin
School staff member with responsibility for Trust Governor	LGB Admin
CMAT Governance Lead	System Admin

If there is any doubt over appropriate access level please consult the NRCDES Governance Support Team.

Document Uploads

The Trust Governor allows anyone with an access level of 'Governor + docs' or above to upload documents. Using a drop down list the system allows uploaded documents to be placed into a specific category, for instance 'pupils', 'finance', 'performance data', 'Catholic Life'. It is also able to upload a document as a 'policy document' or a 'general document'.

As this is 3 layered system, it is also possible for NRCDES to upload documents that are relevant to all governors across all of our Catholic schools in the Diocese such as this guidance note or the regular updates from the Director of Education. Likewise, the CMAT Governance Leads can upload documents that they will wish all governors in their CMAT to be able to access. Finally, schools can upload documents that relate solely to their school.

There are three important issues relevant here: document visibility, searchability and version control:

Document visibility:

In each case, the system allows the user to determine the audience for that document and to tailor its visibility within the system users. To do this in the document upload section, you must 'link the document' to a specific school (committee) and set the audience to the LGB of that specific school. If you do not then the document will be visible to all users in that CMAT.

Searchability:

The number of documents uploaded onto The Trust Governor will increase over time. Very soon to locate documents, schools will need to use the key word search facility. In addition, each school will have their own version of some documents, e.g. School Development Plans. So it is important therefore that the following naming convention is followed:

<three letter school identifier>_<Document title containing key word linked subject matter>_<version number>

Sample document: All Saints School Mansfield, School Development Plan, version 2

Sample document title: ALM_School Development Plan_v2

Version control:

It is quite common for many documents to be 'working documents'. In other words, they will evolve and be developed over time. It is obvious then that newer and newer versions of documents will be uploaded to Trust Governor. Having version numbers as above really helps us to ensure that we can locate the most current version of a document. However, it is also important that when a new version of a document is uploaded the predecessor version is placed in the document archive. This is easily done by checking the 'Arc' box in the document manager section of the system (note only available to users with user rights of 'document +docs' or above).

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