

Local Governors' Handbook 2017-18

Version 3



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Foreword

Being a Local Governor, particularly in the currently ever-changing educational landscape we live in, requires enormous effort, passion and dedication. We value and thank you for your continued commitment to our schools and CfBT Schools Trust, and look forward to working with you all in 2017-18.

This Handbook is one of a suite of publications we have developed to support you in your roles. The other documents in this collection are: the Governance Framework which explains our constitutional structure, and a Governors' Toolkit containing our template supplements. Our intention is to make our guidance documents clearer and easier to use, with each document standing alone, but also forming a package, that can be used by variety of audiences including Ofsted who may be referred particularly to our Governance Framework

All three documents will be sent out each year at the start of the academic year and be stored on the CST Google hub.

If you have any queries, or require support around governance, please do not hesitate to contact me on 0118 902 1670 or lsujeewon@cfbt.com.

A handwritten signature in black ink, appearing to be 'L. Sujeewon', written in a cursive style.

Local governance at CfBT Schools Trust: an introduction

Governance in multi-academy trusts (MATs) works differently to that in maintained schools, and CST's governance structure is no exception.

When a school joins CST, its Local Governing Body becomes a sub-committee of our Board of Trustees with responsibility to oversee and challenge school performance at local level but no strategic authority.

We recognise that Local Governors can often find it difficult to make this adjustment, and have invested a significant amount of time developing a Scheme of Delegation hand in hand with all our Local Governing Bodies (LGBs) that clearly defines the roles and responsibilities of all parties in the Trust. You can find out more about this key document on page 14.

Who are Local Governors?

The LGB of a CST school will usually consist of:

- the Chair
- the Vice-chair
- other Local Governors
- the Principal in an ex officio capacity
- parents with appropriate skills
- up to two staff representatives with appropriate skills.

It may also include:

- a representative of a partner organisation or the local community
- a number of further CST-nominated representatives depending on the Trust's assessment of the school.

At CfBT Schools Trust, we believe that Local Governors provide a voice for the school community and should always advocate in the best interests of both pupils and staff.

An active, enquiring and committed Local Governing Body enhances school leadership and enables CST to understand the context and complexities of each our schools. We've pulled together some further guidance overleaf on how to put these ideals into practice...

How to be a good Local Governor in 10 easy steps*...

1	Get to know your school	Attend and help out with events and visits to get to know the school community.
2	Attend meetings	Let the Chair know if you can't make it and why; be prepared and read all your papers!
3	Be a team player	Learn from each other and abide a majority decision; do not disagree in public with a decision – even if you don't agree with it!
4	Make a positive contribution	Understand what you can offer and take advantage of training opportunities. Make use of Governor websites, e.g. The Key, NGA and other online resources.
5	Follow procedures in meetings	Do signal to the Chair when you want to speak; don't monopolise the discussion or refer back to points that have been decided.
6	Remember your authority is collective, not individual	You can only speak and act on behalf of the Local Governing Body when it has formally delegated this power to you.
7	Be clear – you are neither a representative nor a delegate	You have a duty to put forward the views of those you represent (e.g. parents, staff) but should vote according to what is best for the pupils and the school.
8	Maintain confidentiality and discretion	Keep confidential matters to yourself! The more trust placed in you by the school community and other Local Governors, the more effective you can be as a Local Governor.
9	Declare any personal interest	Never use your position to gain advantage or benefit; you must withdraw from discussions in which you may have a personal or financial interest.
10	Be an ambassador for your school and the Trust	Find every opportunity to spread good news; never talk down the school or Trust in public, nor gossip about individual staff or pupils.

*Adapted from *Ten Golden Rules for Good School Governance* posted on <http://schoolgoverning.blogspot.co.uk/>

Key roles and responsibilities

The role of the Chair and the Vice-chair of the Local Governing Body

The Board of Trustees approve the Chair and the Vice-chair of the Local Governing Body for an initial four-year term of office.

- The effectiveness of a Local Governing Body depends largely on the calibre of the Chair.
- Chairs should maintain a clear vision, have excellent organisation and time management skills, and ensure meetings are conducted efficiently, legally and with each Local Governor playing a full part.
- Chairs must exercise discretion in communicating their personal opinions regarding matters being discussed so that the views of other LGB members and rigorous debate are not stifled and so that the vision and values of the Trust are not undermined.
- A Vice-chair will deputise for the Chair in his or her absence in all matters of Local Governing Body business.

A job description for the role of Chair can be found in the Local Governors' Toolkit.

The role of the Vice-chair

The following has been designed to ensure that the Vice-chair can play an important role in an effective Local Governing Body. There may be some functions in this list that are carried out by the Chair, or are delegated to other Local Governors, and this should be taken into account in any individual situation:

- support the Chair in the conduct of meetings
- ensure that decisions taken by the Local Governing Body are clear, understood by all, and are enacted
- ensure Local Governors' participation in and between meetings
- welcome and induct new Local Governors
- ensure that committees (if any) and working parties are working effectively and to their terms of reference
- stand in for the Chair when necessary
- listen and be a 'critical friend' to the Chair.

Delegated responsibilities

Local Governing Bodies are sub-committees to the CST Board, and as such they must understand and follow their responsibilities as detailed in the Scheme of Delegation. In summary, CST Local Governors are accountable to the Board with specific delegation for strategy, monitoring, support and challenge within their school. Their main functions are as follows:

- work with the schools' Regional Director/Director of Secondary Academies, Headteacher and Leadership Team to develop the schools' vision, ethos and strategic direction within the overall CST strategy and local context
- support the Regional Director/Director of Secondary Academies in holding the Headteacher to account for the educational and financial performance of the school
- ensure money is well spent.

Staff and parent Governors

Staff and parent Governors are important to the local governance structure as they bring the perspective of these groups to the Local Governing Body and are able to express any widely held views of these respective groups. However, there are some key directives that parents and staff must understand regarding these roles. They do not have a mandate to act as go-betweens and must understand their personal view may differ from the general staff or parent view.

At all times, staff and parent Local Governors must act as Local Governors and not individuals. They should not participate in discussions where they have a personal interest in the outcome. In particular, staff must not be involved in discussions about the pay of colleagues and parents should not air personal differences about their own children at Local Governors' meetings.

Staff and parent Local Governors should be clear about what is confidential and what can be shared with their respective groups. Staff and parent Local Governors should ensure that they table issues brought to them outside of meetings through the Clerk or Chair, and never try to resolve issues outside of the school or Trust processes.

Safeguarding responsibilities

CST gives safeguarding a high priority and expects its schools and Local Governing Bodies to comply with all statutory legislation and CST guidance in this matter. The Local Governing Body must ensure it is monitoring the school's compliance with the CST safeguarding policy, and that there is a safeguarding Local Governor who is monitoring that compliance through regular monitoring visits in association with the Trust and the school and robust challenge of the Headteacher's report. *(See safeguarding visit pro forma and safeguarding role description in Local Governors' Toolkit.)*

Clerking responsibilities

The Clerks act as conduits between the Trust and Local Governing Bodies by advising on Trust policy and procedure. They should service the administration needs of the Local Governing Body and report standard information to the CST Governance Lead.

The Trust has a number of Trustee-approved policies which all schools are expected to adopt. These can be found on the CST Google hub and are reissued by email when revisions have been made. The Clerk will need to ensure that information sourced nationally pertains to academies and not to Local Authority schools. If clarification is needed on national guidance and what pertains to academies and free schools, or Trust policies, please contact the CST Governance Lead.

A sample job description can be found in the Local Governors' Toolkit.

Recruitment of Local Governors

Who to look for and how to find them

The Trust has moved away from the traditional Governor's model requiring specific numbers and 'types', such as parent or community Governors. Instead, we would prefer our LGBs to recruit people who are passionate about education, the school they will serve **and** have the appropriate skills to create a balanced, and experienced group of stakeholders.

To that end, we expect that all members of the LGBs will annually undertake a skills audit, the results of which can be collated using the CST skills matrix (see Local Governors' Toolkit). This will enable the group to identify where there are individual and collective strengths, and where there are gaps which recruitment would help to fill.

When looking for Local Governors a variety of means can be used to source these candidates. Recruitment, through the Local Authority and advertising in the local press and school website will generally yield a number of candidates. However, some areas of the country do have difficulty finding the numbers or calibre of candidates they require. In this instance, national recruitment agencies can be accessed through the Trust Centre.

CST also has its own dedicated website, where vacancies for Local Governors may be posted.

A template application form can be found in the Local Governors' Toolkit, and once the potential candidate has filled this in and been interviewed by the Chair, approval of this appointment should be sought from Trustees. Vice-chairs will generally be appointed from within the LGB but, again, need to be approved by Trustees.

In the case of the recruitment of Chairs, the LGB should generally follow the process laid out in the following pages and always inform us that an incumbent CoG is due to stand down. This enables the Trust Centre to work with the school to find a new Chair, and potential candidates must be interviewed by the CST CEO and Chair of Trustees.

The Headteacher organises expressions of interest from parent representatives and for the staff representatives.

Process for appointing Chairs of Local Governors

When	Facilitator	Action
Up to one year before CoG stands down or when a CoG resigns before the end of the term of office	Clerk to PA PA to Clerk CEO CoG	The Clerk will inform the CST Executive (via Isujeewon@cfbt.com) that the Chair's term of office is coming to an end. The CST Executive will inform the LGB that they will begin the process of appointment, and invite expressions of interest from the LGB. CST may begin a local or central external recruitment process if appropriate. The CoG will prompt Governors who are interested in the post to come forward in order for the CoG to explain the role and its responsibilities. The CoG may offer to allow interested Local Governors to shadow the role.
At least one term before the Chair stands down	Clerk Clerk to PA CEO	Remind LGB of expiration date of CoG terms of office. Collate confirmed expressions of interest from Local Governing Body and completed application forms. These may be sourced from the current LGB or from locally searched candidates. Send to CEO via Isujeewon@cfbt.com CST will add any centrally searched candidates.
As soon as possible after applications are received	PA to CEO	CoG candidates (s) will be interviewed by the CEO and Chair of Trustees.
At least one month before the incumbent CoG stands down Local Governing Body meeting	PA to CEO	CEO and Chair of Trustees will consider application and recommend approval of the preferred candidate to the Trustees. Trustees will approve the appointment of the new CoG. The CST Executive will inform the Clerk of the approval of the appointment of the new CoG.
At the Local Governing Body when the incumbent CoG stands down	Clerk	The Clerk will officially minute the new CoG's appointment.
The Chair's position can be terminated by either party within the four-year term	CST CoG	Notice of termination or resignation should be given in writing to the other party.

Process for appointing Local Governors

When	Facilitator	Action
Autumn term	Clerk	Local Governors will complete the LGB Skills Audit.
	Clerk	The Clerk will collate the completed audits and produce gap analysis for use in succession planning and the recruitment of new Local Governors.
On notice of vacant posts	Clerk	The Clerk will inform the CST Chief Executive via lsujeewon@cfbt.com that they have received notice of Local Governor resignations.
	CEO	The CST Chief Executive will inform the LGB that they should begin the process of appointment and canvass for potential candidates to come forward.
	CEO	CST may assist in beginning a local or central external recruitment process if appropriate.
	Clerks/ CoGs	The CoG may prompt candidates who are interested in the post to come forward in order for the CoG to explain the role and its responsibilities.
As soon as possible after CST has notified the Clerk to begin the recruitment process	Clerk	Candidates should complete the Local Governor application form.
	CEO	CST will add any centrally searched candidates to the list of nominations.
	Clerk	The CoG and other appropriately skilled Local Governors will meet with proposed candidates and consider which candidates meet the LGBs skills requirements. Suitable candidates will be known as preferred candidates at this point.
As soon as possible after meeting have been concluded	Clerk	The Clerk will send the names of preferred candidates to the CEO via lsujeewon@cfbt.com
	CEO	The CEO will consider the LGBs recommendation and the CE Team will inform the Clerk of the approval of the appointment of the new Local Governor(s).
At next Trustee Board meeting	CEO	The CEO will recommend official approval of the preferred candidate to the Trustee.
At the next LGB meeting after CEO approval has been given	Clerk	The Clerk will officially minute the appointment of new Local Governors.
As appropriate or at the end of an academic year	Clerk	Notice of resignation should be given in writing to the CoG. The Clerk will notify the CE Team of vacancies.

Induction procedure for new Local Governors

Schools and their LGBs should ensure that all new Local Governors are given the necessary information and support to fulfil their role with confidence. This process is an investment in effective governance and retention of high-quality Local Governors.

On appointment of a new Local Governor

The following should give the new Local Governor background information on the Trust, school and current issues, explain how the Local Governing Body and their committees work and clarify the roles and responsibilities of Local Governors:

To be sent by Clerk to new Local Governors	<ul style="list-style-type: none">• recent minutes and Headteacher's report (last set)• list of Local Governors with contact details• meetings calendar• school development plan (or action plan)• list of panel membership and link Local Governors• terms of reference for any panel• Scheme of Delegation• latest copy of the DfE Governors Handbook (or web link)• latest copy of CST Governors' Framework• latest copy of the CST Local Governors' Handbook• latest copy of the CST Local Governors' Toolkit
To be sent by school	<ul style="list-style-type: none">• map of school• school prospectus• last Ofsted report and link to previous inspection reports on the Ofsted website• List of staff and their responsibilities• Staff Handbook• calendar of school events and term dates
To be sent by CST (after Clerk has informed them of the appointment)	<ul style="list-style-type: none">• approval of appointment• date of any planned upcoming CST training for Local Governors and date of the CST governance meetings

Before their first meeting

Before their first meeting, the following people will ensure that the new Local Governor feels welcomed, has had the opportunity to visit the school, to ask questions about their role and to have informally met the Local Governor who will act as their mentor.

Headteacher	<ul style="list-style-type: none">• provide a tour of the school• ideally, introduce the new Local Governor to staff• give an informal briefing on the school
Chair of Governors	<ul style="list-style-type: none">• contact the new Local Governor to outline roles and responsibilities, the expectations of the Local Governing Body, the need for confidentiality and the background to the school's relationship to CST• arrange for a Local Governor to act as mentor (if appropriate)
Mentor	<ul style="list-style-type: none">• arrange to meet (or at least speak with) the new Local Governor informally to explain how the Local Governing Body meetings are conducted

At their first meeting

Chair of Governors	<ul style="list-style-type: none">• ensure introductions are made at the start of the meeting
Members of panels and link Local Governors	<ul style="list-style-type: none">• invite Local Governor to the next meeting, so that they can attend a meeting of each. This will give a good overview of the complete work of the Local Governing Body and allow the Local Governor to make an informed decision regarding which one(s) to join
Clerk to Governors	<ul style="list-style-type: none">• confirm the Register of Business Interest form is completed• confirm disqualification forms (if applicable) are completed• confirm there is a risk assessment in place for the new Local Governor whilst waiting for DBS clearance• ensure the appointment is minuted and an approval letter has been requested from CST (see Toolkit)
Mentor	<ul style="list-style-type: none">• arrange to speak with the new Local Governor again after the meeting to clarify any queries or points arising from the meeting

Scheme of Delegation

The CST Scheme of Delegation is a detailed document that sets out the roles and responsibilities of everyone involved in the governance of the Trust. It was developed in consultation with all our Governing Bodies.

The full Scheme of Delegation is available on request, or via the CST Google hub.

Meetings

The Local Governing Body will meet at least once a term (three times a year); a RIB should meet monthly. Extraordinary meetings may be called by the Chair of the Local Governing Body with a minimum of five working days' notice, to deal with exceptional matters, as required.

The following also have a right to attend LGB meetings:

- Trustees
- the Chief Executive, Regional Directors/Director of Secondary or his/her representative
- a representative from the academy regulator (ESFA)
- a representative from the DfE
- other staff of CST management, who may be required to attend by invitation of the Local Governing Body or Board of Trustees.

The agenda and papers should be circulated at least five days before the date of the meeting.

Academies are subject to the Freedom of Information Act, so keeping your papers and minutes in good order is a must.

The Headteacher's report to Local Governors and the Trust

This document should be read in conjunction with the CST Local Governors' Framework 2017 and the CST Scheme of Delegation.

The purpose of the Headteacher's report

The Headteacher's report is the single most important document provided by the school which enables both CST and the LGB to be updated on how well a school is performing. The two main purposes of the report are:

1. Assist in strategic decision making

CST and the LGB require updates on contextual, local and national issues in order for them to support Headteachers in directing (CST) and guiding (LGB) future improvements.

2. Monitor and evaluate performance

The report should help CST and the LGB understand how well the school and its pupils are performing, and what actions the Headteacher is carrying out to build on good practice and resolve issues. It should do this by:

- providing a concise picture of the school's performance at national, local and school level, and explain progress towards outcomes and significant barriers to progress
- containing certain common elements, whilst retaining features that pertain to the unique nature of the school context
- varying the level of detail according to the term or the school circumstance.

NB: Names of individual pupils, families or staff members must always be anonymised.

Report style

The Headteacher's report should be written so it can be accessed by a variety of audiences. The following can be beneficial:

- use of plain English
- the inclusion of additional tables, venn diagrams or graphs
- explain or avoid the use of acronyms or educational jargon
- transparent and open tone that encourages informed discussion
- indicate if the item is for information, consultation, action or a decision is required
- timescales for actions and their owner(s) should be specified.

Frequency

There should be a minimum of three Headteacher reports a year, one per long term to tie in with the cycle of full Local Governing Body meetings. A shorter interim report may be written at other times if appropriate.

Circulation

A good practice recommendation would be to include a frontispiece, thanking Governors in advance for reading the report, and inviting them to email comments or questions by a certain date, or to bring them to the meeting.

The Headteacher's report should be completed and returned to CST by the dates supplied by your Regional Director/Director of Secondary. In addition, the report will need to be sent to the Clerk at least one week before the LGB/RIB meeting.

A copy of the report should be posted on to the Local Governance section of the CST Google hub and sent to the LGB/RIB via the Clerk at least a week before the meeting date. Supporting documents should also be sent within this timescale, and not be presented first at the meeting.

Issues arising after the report has been sent can be presented verbally at the meeting, or deferred to the next meeting.

If things go wrong - complaints procedure for Local Governing Bodies

Under the terms of the CST Scheme of Delegation, Local Governing Bodies may raise a complaint concerning their dissatisfaction about services provided by CST, and summarised in the Memorandum of Understanding. The following document explains the mechanism through which the Local Governing Body can make their complaint known. This will be considered seriously in a timely, sympathetic, efficient manner and at the appropriate level.

This procedure is based on the CfBT Schools Trust's Concern and Complaints Policy.

Application

Four stages

This policy sets out a four stage concerns and complaints procedure:

Stage 1: informal raising of a concern either orally or in writing to a member of CST central team

Stage 2: formal complaint in writing to the CST CEO

Stage 3: formal complaint in writing to the Chair of the Board of Trustees

Stage 4: a referral to the CST Complaints Panel

It is expected that concerns or complaints will be communicated by the Chair of Local Governors acting on behalf of the Local Governing Body.

Stage 1: informal concern/complaint

Initial concerns or difficulties: We expect that most concerns or difficulties can be resolved informally. Certain serious complaints such as discrimination, harassment or victimisation are taken very seriously and may need to be dealt with at Stage 2 without action at Stage 1. Complaints regarding the CEO should be dealt with at Stage 3.

Notification: In the first instance and if appropriate the Chair of Governors should raise their concern or difficulty with the Regional Director / Director of Secondary or Complaints Coordinator.

Acknowledgement: We will acknowledge a written notification by email, within two working days of receipt during term time and as soon as practicable if received during the holidays.

A concern raised orally will not necessarily be acknowledged in writing but a written record will be made and a copy sent to the Complaints Coordinator.

Unresolved concerns: A concern which has not been resolved by informal means within 15 working days should be notified in writing as a formal complaint which will be dealt with in accordance with Stage 2 below.

Stage 2: formal complaint

Notification: Complaints which remain unresolved under Stage 1, complaints which require further investigation, or dissatisfaction with some aspect of Trust services or procedures should be made in writing with full details and sent to the CEO or Complaints Coordinator with all relevant documents and your full contact details.

Acknowledgement: Your complaint will be acknowledged by telephone, email or letter within two working days during term time, indicating the action that is being taken and the likely timescale.

A written record will be made of the acknowledgment and given to the Complaints Coordinator.

Investigation: The CEO may ask a senior member of staff to act as Investigator. The Investigator may request additional information from you and will probably wish to speak to you and others involved personally.

The outcome of the investigation will be recorded in writing and given to the CEO who will then notify you by telephone, fax, email or letter of his decision and the reasons for it.

Written records will be kept of all meetings and interviews held in relation to your complaint, including a written record of the CEO's decision.

Timeframe: The CEO will aim to inform you of the outcome of any investigation and his decision and reasoning within 28 working days from the receipt of the complaint.

Stage 3: reference to the Chair of the Board of Trustees (Chair of the Board)

Notification: If you are unsatisfied with the CEO's decision under Stage 2 of the procedure, or if your complaint is regarding the CEO, your complaint may be made in writing to the Chair of the Board of Trustees. This is an optional stage and it may be more appropriate for your complaint to be referred to Stage 4.

If you do wish to invoke Stage 3 then please write to the CST Chairman (c/o CST Reading office) within five working days of receiving the CEO's decision at Stage 2. Your letter should include full details of your complaint and enclose all relevant documents as well as your full contact details.

Acknowledgement: Your letter will normally be acknowledged by telephone, email or letter within four working days of your letter being received during term time. The Chair of the Board will indicate the action that is being taken and the likely timescale.

Action by the Chair of the Board of Trustees: The Chair of the Board will usually arrange for your complaint to be investigated following procedures equivalent to those at Stage 2 above. When the Chair of the Board is satisfied that he/she has established all of the material facts, so far as is practicable, he/she will notify you of his/her decision and the reasons for it.

Timeframe: The Chair of the Board will aim to provide you with a response within 10 working days of receiving your letter during term time.

Stage 4: reference to the CST Complaints Panel

Overview: A Complaints Panel Hearing is a review of the procedures and decisions taken by the CEO and where relevant the Chair of the Board. The Panel will not consider any new areas of complaint which have not been previously raised as part of the complaints procedure. The decision of this panel is final.

Notification: If you are not satisfied with the Chair of the Board's decision under Stage 3, or the CEO's decision under Stage 2 and you do not wish to invoke Stage 3, you may ask for the complaint to be referred to the Complaints Panel by writing to the Complaints Coordinator within five working days of receiving the Chair's or CEO's decision.

Your request will usually only be considered if you have completed Stages 1 and 2, and where appropriate, Stage 3. Please ensure that you include a copy of all relevant documents and your full contact details with your letter. Please also include a list of all documents you believe to be in the School's possession which you believe to be relevant to your complaint and you wish the Panel to see. If you require assistance with your request, because of, for example, a disability, please include details of this in your letter and appropriate arrangements will be made.

Acknowledgement: The Complaints Coordinator will acknowledge your complaint in writing within two working days of receipt.

Timescales

We aim to resolve any concerns or complaints in a timely manner. The timescales for each stage of the procedures are set out above. When this policy refers to working days, we mean Monday to Friday, when the school is open during term-time. Some of the procedures may take considerably longer during the holidays when personnel are likely to be on holiday.

Complaints Coordinator

The CEO has appointed a senior member of staff, Linda Sujeewon, to be responsible for the coordination and administration of the complaints procedure. If the Complaints Coordinator is unavailable, or is the subject of the complaint, her duties will be carried out by another senior member of staff appointed by the CEO. The Complaints Coordinator will:

- be the first point of contact while the matter remains unresolved
- keep records of each complaint and how matters proceed (including noting at which stage each complaint is resolved)
- coordinate the complaints procedure across the Trust
- arrange additional assistance for Local Governors when required, e.g. because of a disability
- provide ongoing training for all school staff regarding the complaints procedures and this policy
- monitor the level and type of complaints as well as the keeping, confidentiality and storage of records in relation to complaints, reporting to the CEO on a regular basis
- keep the Trust informed of any complaints being dealt with at Stage 2 to 4.