

LGB Skills audit guidance for clerks

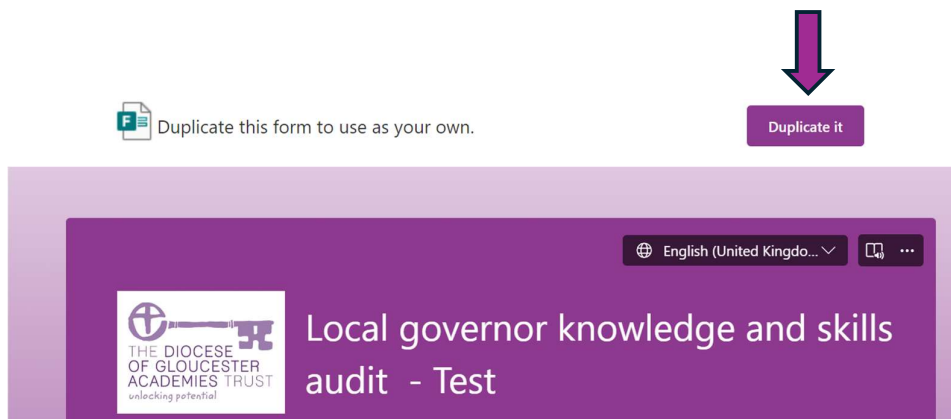
Introduction

This document is intended to be used to assist clerks in customising the Trust LGB skills audit form for their school, ready to send out to local governors. Clerks should receive the form via email from the Governance and People Administrator. The form will also be uploaded to the DGAT website in the Local Governance section.

By following the instructions below each clerk can create their own school's LGB skills audit form for local governors to complete. If you clerk for more than one school you will need to create a form for each of your schools. All forms will be saved in MS Forms and once you have duplicated your form it can be accessed in MS Forms at anytime.

Step one – Duplicate form

Once you have opened the link to the skills audit form, click on the purple duplicate button to use the form as your own. This way all the responses will be sent back to you as clerk.



Step two – Personalise and add the school’s name

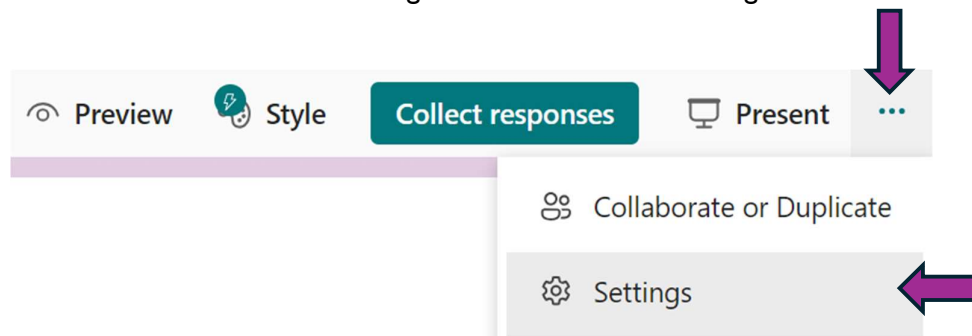
To add the school’s name, click on the wording shown below at the top of the skills audit. Delete the word ‘copy’ and add in here the school’s name. Your change will automatically save.



Local governor knowledge and skills audit -
Test (Copy)

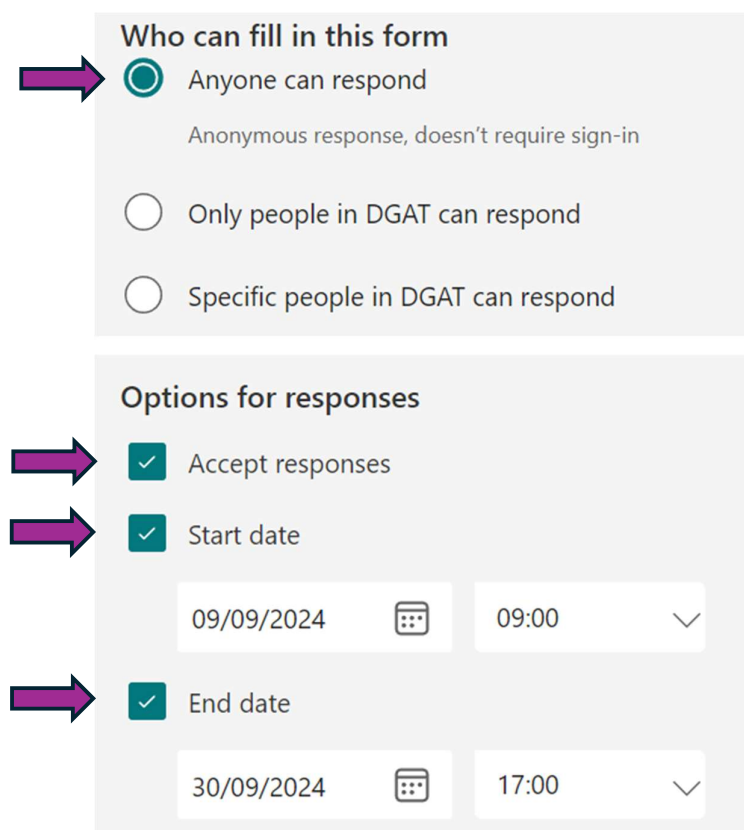
Step three – Optional editing of settings

In the settings area there are some optional settings you can edit. At the top of the screen, click on the three dots over on the right side to access the settings menu. Then select settings.



To change settings, click the white circle or square against the setting you wish to select to change. When your setting has been changed, the white circle or square will turn green.

Please ensure in the section 'Who can fill in this form' that 'anyone can respond is selected' and do not change this.



Who can fill in this form

Anyone can respond
Anonymous response, doesn't require sign-in



Only people in DGAT can respond

Specific people in DGAT can respond



Options for responses

Accept responses

Start date

09/09/2024  09:00 

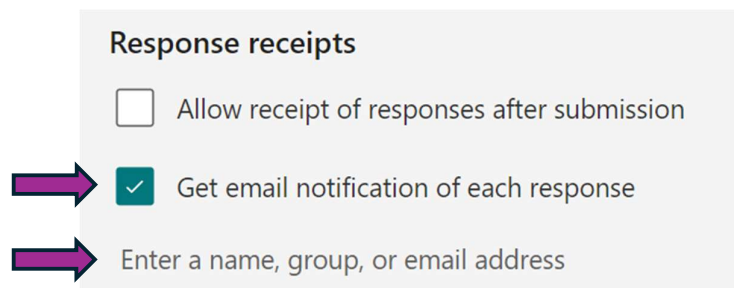
End date

30/09/2024  17:00 

You can choose to set a start and an end date for responses to be submitted. To do this click on the box 'Accept responses' and then the 'Start date'. In the box with a calendar icon select the date which you would like to commence receiving responses from. In the box next to this you can add a time to start receiving responses from. Below this follow the same steps to add an end date to receive responses – completed skills audits will not be received after this date (unless you change it) so please ensure you communicate this date clearly to local governors and send a reminder as the end date approaches.

You can also choose to get an email after each response is submitted. To do this please scroll down within the settings menu until you reach response receipts. Ensure get email notification of each response is selected and enter your email address in the box below. You will then receive an email every time a governor has completed and submitted a response.

There is also the option to select to allow receipt of responses after each submission. This sends a receipt to each governor to let them know their completed form has been submitted.



Response receipts

Allow receipt of responses after submission

Get email notification of each response

Enter a name, group, or email address


Step four – Collect responses / send to governors to complete

At the top of the screen on the right side, click on the teal 'collect responses tab'.



Under send and collect responses, ensure anyone can respond is selected. There is no need to select any of the other options.

Send and collect responses


- Anyone can respond
Anonymous response, doesn't require sign-in
-  Only people in DGAT can respond
- Specific people in DGAT can respond

On the other side of the screen there are two options to send the form to local governors.

At the top of screen is a link to copy and paste into an email or share via GovernorHub.

Ensure you have ticked “Shorten URL” before you click to copy the link. This shortens the link you send out.

Once you have selected copy you can then paste this link into an email or onto the notice board of GovernorHub to share with your LGB.

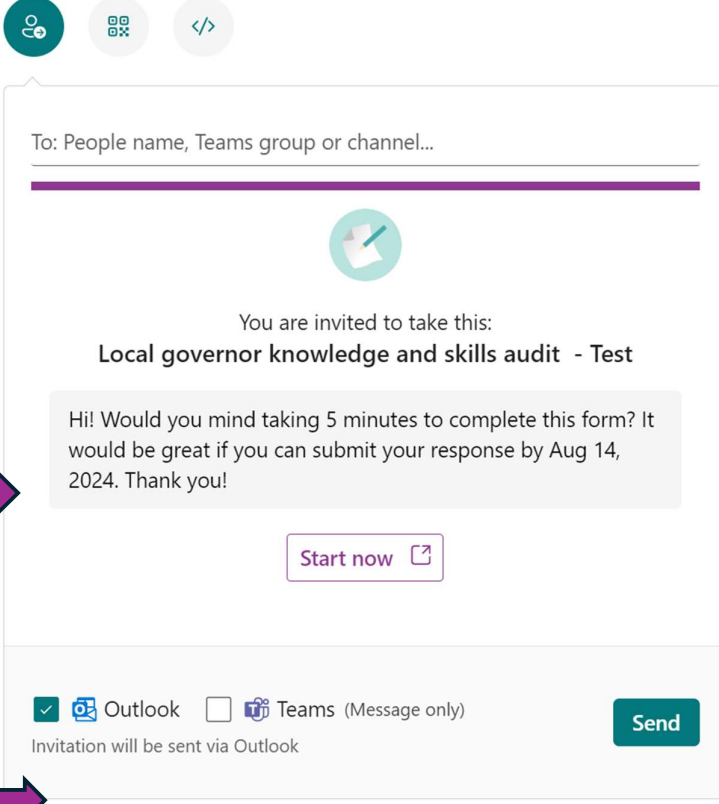


↔ <https://forms.office.com/e/T3...> Shorten URL [Copy link](#)

Below the copy link you have the option to send it direct via email from MS Forms, as shown below. You can copy or type the email addresses you wish to send it to into the “To: People name etc” bit at the top of the box.

You can choose to customise the message you send with the form by editing the text in the grey box.

Finally ensure you have selected the outlook box before you select send.

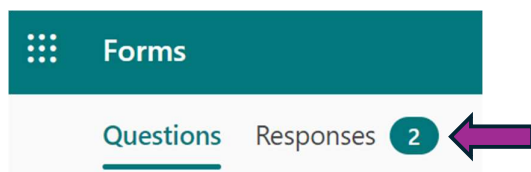


The screenshot shows a Microsoft Teams invitation form. At the top, there are three circular icons: a person, a grid, and a code symbol. Below these is a text field labeled "To: People name, Teams group or channel...". A purple horizontal line separates this from the main content. The main content features a teal circular icon with a document and pencil, followed by the text "You are invited to take this: Local governor knowledge and skills audit - Test". Below this is a grey text box containing the message: "Hi! Would you mind taking 5 minutes to complete this form? It would be great if you can submit your response by Aug 14, 2024. Thank you!". A "Start now" button with a link icon is positioned below the message. At the bottom of the form, there are two radio buttons: "Outlook" (checked) and "Teams (Message only)" (unchecked). A "Send" button is on the right. A purple arrow points to the "Start now" button, and another purple arrow points to the "Outlook" radio button.

Step 5 - Viewing your results

To view your responses and results click back on your customised form from the main MS Forms page.

On the top left hand side at the top of the form you will find Responses. Click on this to view results.



You will get this view below showing number of responses with the option to view results individually on the view results button. A summary of all results are shown below. You can also view all individual responses via a downloadable excel spreadsheet.

Local governor knowledge and skills audit (Copy)

2 Responses

03:39 Average time to complete

Active Status

Analyze and explore up-to-date results in Excel.

Local governor knowledge an...
Vicki Cowan (Central) > Documents

Results Summary

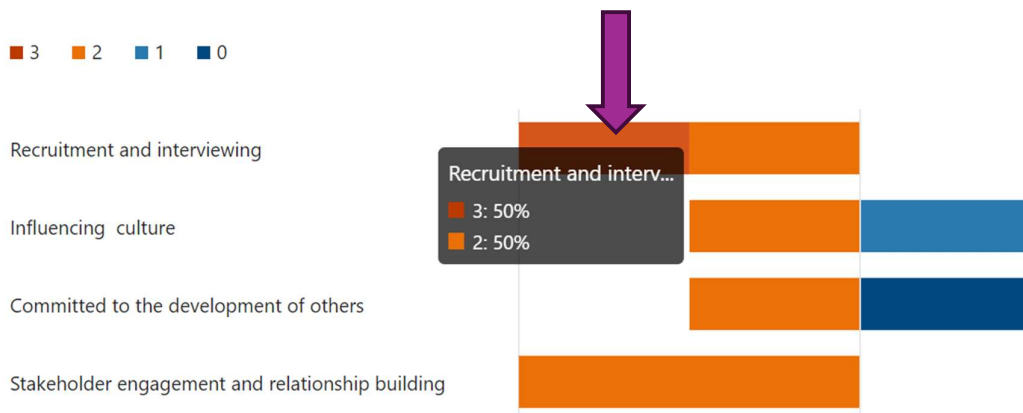


An example of part of the result summary is shown above. You can hover your mouse over the coloured bars to get the breakdown of each question. The example shown below gives the percentage of experience/expertise given by each local governor. Where 0 is no experience and 3 is significant experience. The results summary will show the collective response of the LGB.

6. People

[More Details](#)

3 2 1 0

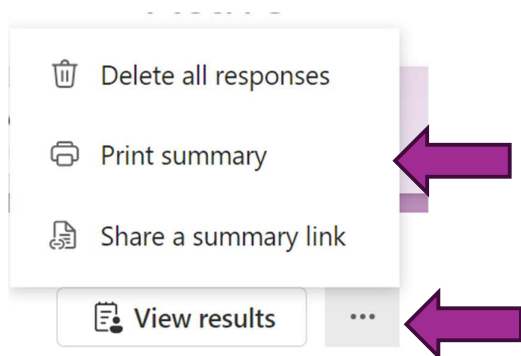


Step 6 - Sharing results

You can share these results by clicking on the three dots next to the view results button.

You then have the option to print the results summary or share a link to the results summary via email or on GovernorHub.

If you select share a summary link it will give you a link you can copy and paste. This is probably the best way to share and allow others to view results.



Help and support

If you need any help or support with the skills audit form or have any questions, please do not hesitate to get in touch with us. You can contact Vicki Cowan, Governance and People Administrator, via email:

vcowan@cen.dgat.org.uk