



National Training Programme for Clerks to Governing Bodies

Course Reader

School Governors

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Course Reader

2005 Edition

Dedication

The Training Programme for Clerks to Governing Bodies is dedicated to the memory of Harry Wills (1943-2003). Harry was Head of the School Governor Support Service in County Durham, Director of Consortium 52, a founder member of GoverNorth (North East group of co-ordinators of governor services) and represented National Co-ordinators of Governor Services on DfES Advisory Group on Governance.

In his earlier career as a primary headteacher and then as a head of an LA service Harry always placed at the forefront of his activities the need to improve standards of education. This training programme is a lasting testimony to his work in governance.

Acknowledgement

The Department for Education and Skills, following a competitive bidding process commissioned Consortium 52, comprising LAs and church authorities in the North West, North East, and Yorkshire and the Humber to develop a National Training Programme for Clerks to Governing Bodies. In developing this training programme Consortium 52 would like to thank all those who have contributed. There are too many to list individually, particular thanks must go to all the clerks, governor services managers, church representatives, chairs of governors and headteachers and governor associations who contributed to the design and development of this programme.

The competences included within the Assessment Book have been established in collaboration with the Virtual Staff College.

Consortium 52 Directors

Joy Bellis	Lancashire LA (North West)
Helen Richardson	Newcastle LA (North East)
Richard Smith	Leeds (Yorkshire and the Humber)

Project Manager

Carol Woodhouse	Blackwood House Publishing
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Course Introduction

Welcome to the five-module National Training Programme for Clerks to Governing Bodies. It provides two routes to certification:

- (a) Taught Course
- (b) Distance Learning Course

The main purpose of the training programme is to enable new clerks to develop the competences necessary to provide the Level 2 Clerking Service, which matches to the Model National Job Description and Person Specification¹, and for experienced clerks to refresh, consolidate and further develop their competences in relation to the provision of a Level 2 Clerking Service. The Level 2 Clerking Service was one of three levels of service identified by Information for School and College Governors (ISCG) in a scoping report, *Clerking Matters (2002)*, commissioned by the DfES.

Level 2 Clerking Service

‘Convening meetings, taking and distributing termly governing body meeting minutes, maintaining attendance records, offering procedural advice and guidance during and between meetings and follow up action as required.’

Each module in the Course Reader is divided into either two or three units that parallel the ten training sessions in the taught course. Each unit will take approximately 3 hours. However, depending on your experience, you will find some units easy and quick to complete, while others will take more time and thought.

For those following the distance learning course the Course Reader is accompanied by a Distance Learning Guide which gives advice and guidance on the activities for each unit of work. At the beginning of each unit you will find a task list which indicates what needs to be done to complete the unit of work. The unit will always include written text but may also require you to watch a small section of videotape or scenario on the interactive CD Rom. You can check how well you have understood the material by completing the assessment tasks.

¹ If you are unfamiliar with the Job Description and Person Specification you will find them in Appendix 1.

Students following both courses complete the same assessments, which are to be found in the Assessment Book. The assessment tasks are designed to give an overview of the main learning points in the module. The assessment tasks will contribute to your portfolio of evidence along with other evidence of your work completed in Module 5 and in other contexts. The portfolio of evidence may be submitted for certification at the end of the course. If you find an assessment particularly difficult, and do not complete it successfully on the first attempt, you will be able to try it again later.

For both courses the main participant resource is this Course Reader which you can work through at your own speed. In addition you will need to refer to the most recent education regulations relating to school governance. These are to be found on the DfES website. DfES propose to amend the Terms of Reference Regulations in due course to include the role of local authorities in conducting schools. Following the 2002 Education Act all schools must reconstitute their governing bodies by 1 September 2006. Until that constitution has taken place the 1999 School Government Regulations apply on constitutional (but not procedural) matters. Clerks will need to keep abreast of changes and developments via the DfES website, their local authority or where appropriate their diocesan/church authority.

It remains for Consortium 52, the designers of the course, to wish you well with your studies and clerking of governing body meetings.

Module 1

The Governing Body

In this first module the themes that are fundamental to the work of the governing body and to the work of the clerk to the governing body are introduced. They are picked up again in later modules and where appropriate dealt with in greater depth.

The three units of work are designed to introduce you to the English education system, its people, organisations, and institutions.

Having looked at the broader picture we then focus in on the governing body itself: its composition, role and responsibilities and methods of working. In some ways the governor role can be argued to be all about relationships so it is important that as clerks we understand how governors secure and maintain good relationships within the governing body, with school staff and the wider community.

Finally, we turn to the main tasks of a governing body, which is to promote high standards of educational achievement and secure the welfare of pupils in its school. Much of their business should be about school improvement, but school improvement has its own language, which will be used in meetings. Additionally, schools have an important role in delivering the five outcomes of Every Child Matters[†]. Clerks need to be familiar with the language, the statement of aims and values, school improvement plans and outcomes of Ofsted inspection, and the schools role in delivering the five outcomes.

[†] The five outcomes for children from Every Child Matters are:-

- Be Healthy
- Stay Safe
- Enjoy and Achieve
- Make a Positive Contribution
- Achieve Economic Well-Being

Further information is available at www.everychildmatters.gov.uk

Unit 1.1

Clerks: The National Picture

Introduction

The English education system is a complex hierarchy of people, organisations/institutions, and local and national government departments with the prime purpose of educating the country's young people.

The governing body plays a key role within the system with responsibilities which encompass **the direction and conduct of the school with a view to promoting high standards of educational achievement and securing the welfare of its pupils.**

Within this broad framework, a governing body:

- sets the broad strategy for the school's development;
- is accountable to those who established and fund the school, to parents and the wider community;
- must act in accordance with requirements laid down in Acts of Parliament, statutory regulations and the school's Instrument of Government;
- must at all times act fairly and without prejudice.

The School Governance (Procedures) (England) Regulations 2003 require governing bodies by resolution to appoint a clerk to the governing body and to all committees. The clerk to the governing body may not be a governor, an associate member, or the headteacher. Headteachers may not be clerks to committees. Individuals employed to clerk governing body meetings and their committees currently come from a variety of backgrounds:

- employed by local authorities, dioceses and agencies in a professional clerking service;
- employed to clerk church schools (Church based);
- school staff who have clerking as one of their duties;
- people employed under a separate contract to clerk a particular governing body.

In many local authorities schools use the services of two or more types of clerk. The types of clerk may differ but all schools require the same high quality of service.

Stakeholders

The pupils and their standards of achievement are central to the work of the governing body, and its clerk. They are stakeholders in their own education as are their parents/carers, teachers, support staff, headteachers, governors, and the organisations that represent their interests.

Pupils

The most important people in education are the pupils who attend the 23,000 or so schools in England. All other players in the system directly, or indirectly, are there to provide the young people with the highest standard of education available. Sadly, at age 16 as many as 30,000 young people leave school without qualifications. This is an issue for all the stakeholders in education.

Parents

Pupils have parents or people who look after them and perform the duties of parents, and they are major stakeholders in their children's education. The first concern often expressed by them is whether, or not, their child is happy at school. While the pursuit of happiness is not the purpose of the education system, unhappiness is frequently the first indicator that a child is not succeeding. Amongst the wealth of other indicators is performance in national tests. Parents are responsible for the behaviour of their children at school, and to ensure that parents and the school staff fully understand their duties towards children home-school agreements have been introduced. These are often the subject of agenda items and discussion at governing body meetings because the governing body is accountable to the parents for the standard of education provided by the school.

Teachers

The learning process for each child is the professional responsibility of teachers. In the primary school this will in most cases be a single class teacher, although there are job share arrangements and other sharing of classroom duties, particularly in small schools where the headteacher is a teaching head.

In secondary schools traditionally pupils have been taught different subjects by specialist teachers.

The organisation of the teaching, planning of lessons and assessment of pupils is the professional responsibility of teachers. However, the school is responsible to the governing body for the outcomes ie the standards of teaching and learning and the achievement of pupils.

Support Staff

Teachers are supported by staff with a wide range of skills. Their work is critical to the smooth running of the school. The administration staff, mid-day supervisors, learning assistants, laboratory assistants, caretaker and kitchen staff all play their part in implementing the school's policies.

Headteachers

Over the past thirty years the management responsibilities of the headteacher have changed. One of the main changes came about with the introduction of Local Management of Schools (LMS) in the early 1990s. Subsequent changes to the funding and personnel arrangements added greatly to the managerial responsibilities of headteachers.

The headteacher is accountable to the governing body for the work of the school. Therefore, one of the most important tasks for a governing body is the appointment of a new headteacher. Another important task for the governing body is the performance management review and setting of the headteacher's objectives, annually.

The headteacher can choose whether, or not, to be a governor. Whatever the choice, they have the right to attend governing body meetings and report to the governing body on the work of the school. The headteacher is the main professional adviser to the governing body.

Governors

In England there are about 350,000 governors who are all volunteers. This is probably the largest volunteer force in the country. They serve on governing bodies as representatives of the different stakeholders in education. Every school has a governing body and all except a few have the delegated powers to manage their affairs. Amongst other things governing bodies take the strategic decisions about the school's aims, staffing, finance, premises, and curriculum.

**Organisations
representing
stakeholder
interests**

Pupils, parents, teachers, headteachers, and governors all have organisations to represent their interests. The parent, teacher, headteacher, and governor organisations all lobby parliament on behalf of their members' interests and concerns. They are consulted by local and national government on major changes to education.

**Pupil
Organisations**

There are many organisations, which are concerned with children's health and well-being, however there are virtually none established specifically to give children a voice. Many schools have established 'School Councils' in which even very young children are encouraged to give their views. Pupil Forums have been established by some local authorities.

Parent Organisations

In some schools parents belong at school level to a parent teacher association (PTA) which may be affiliated to the National Confederation of Parent Teacher Associations (NCPTA). Other schools may have an organisation known as 'Friends of the School' which primarily seeks to raise additional funds to support the education provided by the school. These organisations are quite distinct and separate from the governing body.

Teacher Organisations

Traditionally teachers have organised themselves in two ways:

1. Teacher Associations
2. Education Interest Groups

The teacher associations are organised nationally and with regional and local associations. They are:

NUT National Union of Teachers
NAS/UWT National Association of School Masters/
Union of Women Teachers
ATL Association of Teachers and Lecturers
PAT Professional Association of Teachers

The above large membership organisations are widely known and represent teachers' interests on many issues but their voices on pay and conditions are the ones most frequently heard by governors and the general public.

Headteacher Associations

Teachers and headteachers interests do not always coincide and so they have separate organisations to represent their interests, although some headteachers remain members of a teacher association eg NUT. The headteacher associations are:

NAHT National Association of Headteachers
SHA Secondary Headteachers Association

General Teaching Council (GTC)

Recently a General Teaching Council has been established to which all serving teachers belong. This is a professional body for teachers and provides an opportunity for teachers to shape the development of professional practice and policy.

Education Interest Groups

Organisations which represent teachers curriculum interests are less well known. There are subject associations, associations for different phases of education and others such as: National Association for Special Educational Needs (NASEN) and National Association for Small Schools (NASS).

Support Staff Organisations

Teachers are supported in their work by staff who fulfil a range of functions including, learning assistants, laboratory technicians, and mid-day supervisors. Support Staff may be members of trade unions such as UNISON, TGWU and GMBU which represent their interests in relation to pay and conditions. ATL also has classroom assistants as members.

Governor Organisations

Currently there are three organisations representing governors' interests at the national level.

ISCG Information for School and College Governors, which is a London-based organisation with a specific interest in clerking.

NASG National Association of School Governors *formerly* NAGM (National Association of Governors and Managers) dates back to a time when primary schools had managers and secondary schools only had governors, hence the previous title. Membership is both individual or by organisation.

NGC National Governors Council came into being in the early 1990's. Membership is via a local association or forum.

Governor Forums/ Associations

Governor forums or associations have been formed in the majority of LAs. They represent the voice of governors locally and are usually members of NGC, NASG or both.

Government of Schools

National and local government both have a role in creating the governance, management, and curriculum frameworks within which education is provided. In faith schools church authorities contribute to that framework.

Government

Overseeing all state education is the government that legislates to regulate the conduct of local authorities, schools and governing bodies.

DfES

The Department for Education and Skills (DfES) led by the Secretary of State for Education and Skills is the government department responsible for drafting primary and secondary legislation. The department has changed its name over the past decade on several occasions. You will come across papers from:

DES (Department for Education and Science),

DFE (Department for Education),

DfEE (Department for Education and Employment),

DfES (Department for Education and Skills).

Much of the work of drafting and implementing the government's education policy is done by civil servants in the Department for Education and Skills. The headquarters of the Department are in Sanctuary Buildings, Great Smith Street, London (very close to the Houses of Parliament). There are other DfES offices in various parts of the country. Some of the civil servants responsible for school governance are based at Mowden Hall, Darlington.

Ofsted
QCA
TDA

Aspects of the government's will are carried out by non-ministerial departments of state. Three of these QUANGOS (Quasi Autonomous Non-Governmental Organisations) are the Office for Standards in Education (Ofsted), Qualifications and Curriculum Authority (QCA) and Training and Development Agency (TDA)*. Ofsted is regularly referred to by governing bodies while QCA is more likely to be a term used by teachers as it provides curriculum materials and validates assessment.

The DfES has a proactive role consulting with interested parties on aspects of education and making recommendations to the appropriate ministers. They work very closely with Ofsted, QCA, and TTA in implementing the government's education policies and plans.

Local Authorities (Children's Service Authorities [CSA])

In April 2005 Children's Service Authorities took over the responsibilities of local education authorities (LEAs) for all aspects of provision for children and young people. Whilst some documents will refer to the CSA it is becoming more common for references to be made to the local authority. So throughout this reader the term local authority will be used to refer to those authorities with responsibility for children's service provision. Local authorities are made up mainly of locally elected representatives. The local authority may include representatives of church, teacher, and governor organisations. Local authorities organise how their officers fulfil the statutory local government functions in different ways. The work of the local authority is carried out by officers who may work within a Children's Service Directorate or Department. In some Local Authorities education has been combined with another area of responsibility such as Children's Social Services.

Children's Services Authorities have a strategic function relating to the planning, organisation and provision within their area of administration. They also have a statutory function to provide support and advice to schools within their area of administration. They maintain schools by delegating to each school a budget share. The governing body is accountable to the local authority for the management of the delegated budget and in certain circumstances the local authority can suspend the school's right to a delegated budget.

* TDA replaces the Teacher Training Agency from September 2005.

Children Act

The Children Act 2004 requires public, private, voluntary and community organisations with responsibilities for providing services to children, young people and their families to work closely together by putting in place arrangements referred to as children's trusts.

Children's Trusts

- Local authorities are required by law to establish an elected member to lead on children's services and a Director of Children's Services to be accountable and take managerial responsibility for all local authority education and social services for children.
- Local authorities are required to establish a Local Safeguarding Children Board with the purpose of coordinating and ensuring the effectiveness of local arrangements and services to safeguard children. It is expected that most local authorities will have in place children's trust arrangements by 2006 and all by 2008.

The Children Act does not place any specific duties on schools except that schools can be required to participate in the information sharing arrangements. Governing Body meeting agenda will need to reflect how governors are helping their schools work with local agencies to integrate all local services for children.

Priorities

A high priority for the local authority is to promote high standards of educational achievement. Key to this is its support for self-improvement in all schools. To fulfil these responsibilities they:

- monitor information about all schools;
- facilitate the sharing of best practice among local schools and wider;
- support schools which monitoring information suggests need further challenge and support.

Local authorities work in professional partnership with schools in which visits are valued by both parties.

They also work with local governor associations, parent-teacher associations, dioceses, and many others with interests in education to facilitate networking and partnership. One of their responsibilities is to support schools by appointing LEA governors from among those who have the appropriate skills and experience to help a school improve.

Educational Development Plans

Each local authority must currently have an Educational Development Plan (EDP) in which the priorities and activities in their programme to support schools are set out. In future the EDP will be replaced by the Children and Young People's Plan.

Accountability

“Local authorities are accountable to their electorates and the Secretary of State for their efficiency and effectiveness. They must ensure that their core responsibilities are carried out, but, in line with Best Value principles, they may choose to work with outside partners or buy in the necessary expertise from a range of suppliers.”² Local authority performance is judged by:

- performance against targets including measures of school performance;
- information on financial performance;
- Ofsted inspections;
- Audit Commission inspections.

Church Authorities

The majority of faith schools are Church of England or Roman Catholic. They have their own diocesan education boards which undertake a more limited, but similar set of tasks to local authorities for their schools. They provide advice and inspection services in relation to the religious curriculum. They may also provide services for their schools to purchase eg clerking service.

Church of England and Roman Catholic communities provide both voluntary aided and voluntary controlled schools. Support may be delivered through diocesan organisations and most dioceses have diocesan education authorities. There are Methodist schools supported via their Methodist District.

Other faiths provide schools. A small number of voluntary schools are provided by the Jewish faith and maintained in the same way as the Anglican, Roman Catholic and Methodist schools.

Recently several Islamic schools have sought and secured status as maintained schools. The voluntary aided faith schools continue to control their religious curriculum, but have given up control of the secular curriculum and follow the National Curriculum.

Traditionally, they work very closely with local authorities and DfES and are consulted on all matters of curriculum and management.

² Department for Education and Employment. 2001 Code of Practice on Local Education Authority - School Relations.

Schools

The English school system has several different types of schools which reflect how they are funded and managed.

Community and Community Special Schools

Community Schools are by far the greatest number in nearly all local authorities. These are established and maintained by the local authority. The local authority employs the staff, decides on the admissions policy, and owns the property except where funded through a Private Finance Initiative. They include nursery, primary, secondary and special schools and hospital schools. The stakeholder interests in these schools are the local authority, parents, staff and the community.

Foundations and Trusts

Historically many schools were founded by a church authority or a trust. These schools now fall into one of three categories: voluntary controlled, voluntary aided or foundation. The governors representing the interests of the foundation or trust are referred to as foundation governors.

Foundation Schools

Foundation schools were introduced in September 1999 by the Schools Standards and Framework Act 1998. Each one is totally funded by a local authority; however, they differ from community schools in that the governing body employs the staff and controls pupil admissions. The property is owned either by the governing body or a trust. The stakeholder interests are the Foundation, LEA/CSA, parents, staff and community. Currently, there are some foundation schools, which despite their name do not have a foundation or a trust. Instead of foundation governors they have 'partnership governors' nominated by the general parent body.

Voluntary Aided Schools

The trustees or foundation usually own the premises. The governing body is responsible for capital projects and structural repairs and maintenance, but the DfES provides grant assistance of 90%. The governing body employs most of the staff and is the school's admissions authority. They are mainly funded by the local authority for revenue expenditure.

Voluntary Controlled Schools

The premises are usually owned by the foundation or trustees, but the funding for capital projects and structural repairs is through the local authority. The local authority employs the staff and is responsible for the admissions arrangements to the school. Revenue expenditure is funded by the local authority.

Federations

Federating up to five schools under one governing body enables a sharing of management responsibilities and administrative duties. The Education Act 2002 made provision for maintained schools to federate under one governing body. The federation of schools (Community Schools, Community Special Schools, Voluntary Controlled Schools and Maintained Nursery Schools) (England) Regulations 2003 came into force on 1 September 2003. The Education Act 2005 extends that provision to include the setting up of new federated schools.

Framework of Governance

Governing Bodies have a statutory duty to work within the same legal framework as local authorities; therefore, they are recommended to either adopt the local authority policies or write their own on a range of issues including Equal Opportunities and Health and Safety.

As part of their support to schools local authorities often provide a range of services including payroll, school meals, repairs and maintenance, and caretaking and cleaning. Local authorities differ in the way in which they organise the provision of these services and charge for these services. Schools have the option of buying through the local authority or an external provider.

Most local authorities maintain an advisory and inspection team, although the names vary from local authority to local authority eg School Improvement Team. Whatever its name, this team may provide in-service training for teachers and curriculum and management advice as a minimum. The Educational Psychology Service is a statutory service which has responsibility for implementing the Code of Practice for Special Educational Needs.

Support for Governing Bodies

The Education Act 2002 states that:

“The local education authority shall

- (a) secure that every governor is provided free of charge with such information as they consider appropriate in connection with the discharge of his functions as governor, and
- (b) secure that there is made available to every governor, free of charge, such training as they consider necessary for the effective discharge of those functions.”

There are wide variations in the way in which local authorities interpret the term ‘support’ to governing bodies. Many local authorities provide a newsletter, Helpline, comprehensive training programme, briefing papers for chairs and headteachers and an annual conference.

Some local authorities also provide a clerking service to governing bodies which can be bought in often as a Service Level Agreement (SLA). These local authorities generally provide training and career development for the clerks they employ. Some local authorities provide training for other types of clerks appointed by governing bodies.

Assessment

Now you have read Unit 1 complete assessment 1.1 in the Assessment Book.

Unit 1.2

Governing Schools

Introduction

A governing body is a group of people, who represent the interests of the different stakeholders in the school. They are responsible for the strategic direction of the school. In the video clips the governing body of Winsom School discusses a number of issues related to its different roles.

In Unit 1 we mentioned the stakeholders in the different types of schools. In this unit we will explore the idea of stakeholders in more detail before looking at the composition of governing bodies of the different types of schools, but first of all let us turn the clock back to 1976.

Development of the Stakeholder Model

Many schools had governing bodies but they varied from LEA to LEA in their composition and their responsibilities. The Taylor Committee was established in 1975 to review "...the composition and function of governing bodies and their relationships with LEAs, with headteachers and staffs of schools, with parents of pupils and with the local community at large; and to make recommendations."

The Taylor Committee reported in 1977 under the title **'A New Partnership for Our Schools'**. In their recommendations they proposed that every school should have a governing body. The governing body should be made up of people who represented the interests of all who have an interest in the school ie the stakeholders. The main stakeholders in children's education are the parents, teachers, local business (as employers), the LA, and in religious schools the church authority. They recommended that governing body responsibilities "...cover all or some aspects of:

- the appointment and dismissal of teachers and other staff;
- admission of pupils;
- internal organisation and curriculum;
- finance;
- care and upkeep of premises;
- fixing of certain holidays."

Nearly ten years later The 1986 Education Act made governing bodies a statutory requirement in England. Many of the Taylor Committee recommendations were adopted including the reconstitution of governing bodies in 1988 using the stakeholder model. This was the beginning of a new era in governance. Since 1986 there have been several changes to the size of governing bodies and the numbers of representatives from each stakeholder group, however, the stakeholder model has remained more or less intact. What have remained constant are the processes for appointing and electing stakeholder representatives. But first we will look at who is eligible to be a governor.

Who is eligible to be a governor?

Subject to the disqualifications outlined in current school governance regulations, anyone over the age of 18 years when they are elected or appointed is eligible to be a governor. Governors do not have to resign at a given age. They can continue as long as those responsible for appointing and electing stakeholder representatives continue to support them.

Table 1.2i Representation on the different types of governing bodies					
	Governing Bodies	Community Nursery Special	Voluntary Controlled	Voluntary Aided	Foundation
	Types of Governor				
	Headteacher¹	✓	✓	✓	✓
Appointed	LEA	✓	✓	✓	✓
	Foundation		✓	✓	✓ ²
Elected	Parent	✓	✓	✓	✓
	Staff	✓	✓	✓	✓
Nominated	Partnership				✓ ²
Co-opted	Community	✓	✓		✓
	Sponsor	✓	✓	✓	✓

- 1 Under the School Governance (Constitution) (England) Regulations 2003, the Headteacher's place is incorporated into a combined staff category.
- 2 A foundation school may have either partnership or foundation governors depending on whether or not it has a foundation.

Disqualification

However, there are certain people who because of their past or present activities may not serve as governors. Included in the disqualified list are people who meet one or more of the following:

- already a governor at the school,
- detained under the Mental Health Act 1983,
- a record of financial misconduct or mismanagement,
- restricted from working with children,
- served a prison sentence,
- fined for causing a nuisance or disturbance on school premises.

Full details are given in the current school governance regulations.

Before disqualifying any one on these or other grounds the clerk should consult the regulations, establish the facts of the case and seek advice.

The clerk to the governing body cannot be a governor at the school where they are appointed. The 2003 Procedure Regulations do allow governors to clerk committees but governing bodies should consider very carefully how they use this flexibility as professional clerking is important where important decisions (for example on pupil discipline) are taken.

There are also restrictions on who can be a governor in certain categories. The clerk needs to be aware of how the restrictions apply to the governing body. [See the current school governance regulations.]

Disqualification non-attendance

While the majority of governors endeavour to attend every meeting, inevitably there will be occasions when this is not possible, and for very good reasons. However, there has to be a safeguard against the minority of governors who do not resign when they realise they are not, or cannot, fulfilling their governor responsibilities. Any governors, except the headteacher and ex-officio foundation governors, are disqualified from governorship if they have failed to attend governing body meetings for a period of six months without giving their apologies and obtaining the consent of the governing body.

Instruments of Government

Every governing body has an 'Instrument of Government', which lays down the exact size, and number of governors for each stakeholder group. It may also include the term of office for particular categories of governors where this is less than four years. Changing circumstances may lead the governing body to wish to alter the 'Instrument of Government'. There are recognised procedures for making new Instruments (See the current school governance regulations.)

LEA Governors

The local authority **appoints** governors to the governing body according to the criteria it has established. There are representatives of the local authority on the governing bodies of all types of maintained schools.

Parent Governors

The parents of every school **elect** parent governors. If there are insufficient parents wishing to be governors then the governing body can appoint a parent subject to the Regulations. (See the current school governance regulations).

Staff Governors

Staff governors are **elected** by their colleagues. If there are only two staff governor places on the governing body then one is reserved for the headteacher and the other for a teacher unless none of the teaching staff wishes to stand for office.

Community Governors

In community, community special and voluntary controlled and nursery schools the governing body **co-opts** members from the local community who are known as community governors. These may be representatives of local groups such as minor local authorities, the church, community group etc or members of the business community. Governing bodies often seek to co-opt governors who have specific skills from which the school might benefit. This will be a particular issue for those schools providing extended services. In governing bodies which have not been reconstituted under 2003 Constitution Regulations, co-opted governors may only be appointed by governors who have not themselves been co-opted.

Foundation Governors

Foundation governors are **appointed** by the school's founding body, church, trustees or other organisation named in the school's instrument of government.

Partnership Governors

In foundation school governing bodies partnership governors take the place of foundation governors in schools where there is no foundation or equivalent body. Partnership governor nominations are sought from parents of registered pupils. Parents, staff, pupils, elected members of the local authority and local authority employees cannot be partnership governors. The governing body appoints partnership governors from among those nominated.

Sponsor Governors Sponsor governors give substantial assistance to the school, financially or in kind. Up to two sponsor governors may be appointed at a primary school governing body's discretion. From August 2005 secondary school governing bodies can have up to four sponsor governors. They can include representatives of other schools who give advice and support to the school.

Headteacher The headteacher of the school can choose to be a member of the governing body. If they choose not to be a member, they have a right to attend all meetings, and a duty to prepare reports for the governing body. A headteacher who chooses to be a member also has a vote, but cannot be elected chair of the governing body, or any of its committees. There is no limit to the headteacher's term of office.

Associate Members Governing Bodies can benefit from the expertise and experience of people from outside their formal governor membership by appointing associate members to serve on one or more committees and to attend full governing body meetings. Associate member can be pupils, school staff and persons who want to contribute to issues related to their particular area of expertise. Associate members are not governors but they can be granted voting rights in committees of the governing body (detail included in the current school governance regulations).

Terms of Office

Unless stated in the Instrument of Government the term of office will be 4 years. Under the School Governance (Constitution) (England) 2003 Regulations governing bodies can choose a shorter term of office for each category of governor (between 1-4 years). Governors can resign at any time by giving notice in writing to the clerk.

Recruitment of New Governors

A governing body may ask the clerk to put together a pack of information about the school, the work of the governing body and the roles and responsibilities of governors for use with potential new governors. The clerk may wish to seek the advice of the local authority Governor Support Service about recruitment material that is already available.

The governing body may ask the clerk to find out from the local authority or (in certain areas) School Governors' One-Stop-Shop whether there are any appropriate people willing to serve on the governing body.

The new governor may be a stranger to all the other governors, although one would hope that they had previously met the chair and the headteacher. The clerk provides an important point of contact for the new governor who may be very much 'at sea' in the first meeting. So what can the clerk do? The clerk can:

- remind the chair to welcome new governors;
- ensure they have been provided with a copy of 'A Guide to the Law for School Governors';
- prepare a pack of information including a welcome letter, information about available training, local authority newsletter, local and national governor organisation information etc.

Roles and Responsibilities

The governing body has three very clear roles, which we are going to explore in this unit. These were identified in 1995 in a DFE (Department for Education) publication 'Governing Bodies and Effective Schools' and later in The Education (Terms of Reference) (England) Regulations 2000.

In 1995 there was a need for a clarification because, as governing body powers had increased, the tension between some headteachers and their governing bodies had also increased due to a lack of a clear understanding of their respective roles. Like the governors, the clerk to the governing body needs to know and understand those responsibilities that belong firmly in governing body territory, and those that are in the professional domain.

However, life is never simple and you cannot divide governing body and headteacher responsibilities cleanly in two. Inevitably, there is a grey area at the interface between the two sets of roles, and where the line is drawn will vary from school to school.

Strategic Cycle

There is a cycle to the work of the governing body sometimes referred to as the Strategic Cycle. It encompasses the three roles of the governing body and its major tasks.

1. Setting aims for the school and agreeing policies, plans and targets for improvement to match those aims.
2. Monitoring and evaluating the impact of the policies, sometimes known as the Critical Friend.
3. Accounting to parents and others for the work of the governing body and school.

Strategic Role

Strategy is about deciding and keeping under review the broad framework within which the headteacher and staff provide education.

Driving the strategy are four key issues:

- raising standards of achievement;
- establishing high expectations;
- promoting effective teaching and learning;
- securing the welfare of pupils.

At the very heart of the work of every school are its aims and values. These are reflected in the whole ethos of the school.

Recording Strategic Decisions

Governors may lack a good understanding of their different roles. To assist governors in carrying out their strategic role it may help to group items of a strategic nature together on the agenda.

Assessment

At this point turn to the Assessment Book and complete assessment 1.2i.

Critical Friend Role

In past decades governing bodies focussed their efforts on supporting the work of the school by attending school events such as 'Prize Day', plays etc. and occasionally being given a formal tour of the school. Local Management of Schools and Fair Funding have brought increasing responsibilities and governing bodies are no longer expected to take such a passive role in carrying out their responsibilities.

Support

The governing body is still expected to give support to the headteacher and staff. But, that support is now clearly defined and encompassed in the phrase 'critical friend'.

Monitoring

"A 'critical friend' offers support, constructive advice, a sounding board for ideas, a second opinion on proposals and help where needed. But a critical friend may also challenge, ask questions, seek information, improve proposals and so seek to arrive at the best solution." (DfEE (2000) Roles of Governing Bodies and Head Teachers).

The policies and plans agreed by the governing body are implemented by the school staff. The governing body needs to monitor the implementation of the decisions it has agreed in relation to:

- Plans
- Budgets
- Standards of education
- Pupils achievement.

The governing body will need to monitor progress through a range of activities, such as:

- A termly report from the headteacher
- Discussion with pupils and staff
- Reports from governors
- Reports from staff
- Ofsted reports
- Attainment data
- Awards and records of achievement
- Surveys by teachers, pupils and parents
- Numbers of exclusions
- Newsletters
- Analysis of supply cover costs and sickness management
- Analysis of disciplinary incidents
- Analysis of racist incidents
- Site inspections
- Displays
- Press reports
- Number of compliments/complaints
- Attendance at school events
- Reports on the implementation of the School Development Plan/School Improvement Plan
- The Post Ofsted Action Plan
- Observation at first hand

Evaluation

This is an extensive list of data and activities, which needs to be accessed systematically. Governors need to understand that monitoring leads to evaluation, otherwise it serves little purpose.

The governing body discussion, which follows receipt of a report from a governor or from the headteacher, should lead to an evaluation of any decision taken. Governors should be asking themselves the questions – Did we get it right? Did it make a difference to the educational achievement/welfare of the pupils?

So far, the focus has been on the ‘critical’, now let’s turn to the ‘friend’. A true friend is someone who will give an honest opinion, even though it might not be what you want to hear. Collectively governors have a considerable amount of experience and a wide range of skills. Therefore, the governing body should be in a position to give well-tempered advice. A friend is also someone who will act as an advocate promoting the interests of the school and its pupils to the community.

Recording Critical Friend Actions

To help the governing body understand its various roles the clerk needs to be able to identify discussions and decisions which are concerned with supporting, advising, monitoring, evaluating and promoting the school and use these words in the record.

Not all governors are accomplished at giving an honest opinion in an objective and non-confrontational manner. In being a 'critical friend' there may be times when individual governors express disquiet over an issue in an emotional way. The purpose of the record is to reflect the issue in an objective way and where possible to enable action to be taken to resolve any problem.

Assessment

At this point turn to the Assessment Book and complete assessment 1.2ii.

Accountability Role

The school is an important institution in any community. It has a major impact on the future of the younger generation; it lays the foundations for those who will contribute to the national economy; and it may contribute to the well being of the whole community. As a focal point in a community network the governing body is accountable to the community and to those who fund it for the quality of education it provides. There is a hierarchy of who is accountable **to** whom in any community, and a hierarchy of who is accountable **for** what. How the governing body holds to account the headteacher and staff is a major factor in improving the school's effectiveness.

So, how does the governing body fit into the grand scheme of accountability? In faith, voluntary aided, and foundation schools, the church authority or trust is an added dimension. In the education system the pupil is the focal point.

"The headteacher and professional staff are accountable to the governing body for the school's performance. The governing body must be prepared to explain its decisions and actions to anyone who has a legitimate interest. This may include staff, pupils, parents and the press as well as the LA, school's foundation or the Secretary of State." (DfEE (2000) Roles of Governing Bodies and Headteachers).

School Profile

The Education Act 2005 replaces the requirement for governing bodies to publish an Annual Report to Parents with a School Profile. The government's intention is to provide parents with a balanced assessment of the school's ethos, characteristics, performance and improvement priorities. Depending on the final format of the School Profile, governing bodies may still wish to publish a report of their activities or add a section to the school prospectus.

**Recording Actions
Relating to
Accountability
Role**

A significant element of the business of the governing body and its committees is concerned with accounting to others and holding the headteacher and staff to account. As with the other roles clerks can assist governors understand their roles in the way in which they record the business of the meeting. Using the word 'account' and the phrases 'account to' and 'account for' where appropriate gives a written demonstration of a governing body fulfilling this role.

In receiving an agenda item and asking challenging questions governing bodies often fulfil more than one role. Receiving the headteacher's report is a good example, because the report is both an accountability tool for the headteacher, and a monitoring tool for the governing body.

Assessment

At this point turn to the Assessment Book and complete assessment 1.2iii.

Governing Body Meetings

The governing body is required by law to meet at least three times per year. Sometimes governing bodies may need additional meetings to complete the business.

Even with two meetings per term many governing bodies establish a range of committees and delegate to them those responsibilities that they are legally allowed to do. All meetings of the governing body take place within a legal framework detailed in School Governance (Procedures) Regulations 2003 and School Governance (constitution and Procedures) (England) (Amendment) Regulations 2004.

Governors are volunteers and may have work and family commitments, therefore, the time, date and venue for the termly meeting is decided by the members of the governing body. The majority of meetings take place in the evening in the school.

The clerk is responsible for convening meetings of the full governing body and for sending out the agenda and papers so that members have at least seven clear days notice of the meeting.

Who can attend?

The headteacher may attend the meeting even though he or she has not chosen to be a governor. Members of the public may ask to attend a meeting. It is for the governing body to decide whether, or not, they may do so, or whether anyone else may attend. The clerk has a right to attend meetings, but must withdraw if their salary or performance is being discussed.

Business of the meeting

The agenda should include all the items to be discussed. Any proposal for changing previous decisions must be an agenda item, otherwise decisions cannot be rescinded or even amended.

Some governing bodies have 'Any Other Business' (AOB) as an agenda item, but insist that the chair should be notified at the beginning of the meeting of any items to be brought up under that heading. It is for the chair to decide if, and when, the items should be discussed. Other governing bodies do not include AOB as an agenda item because it is poor practice to raise major items at the end of the meeting that should properly have been on the agenda.

Decision making

To make decisions fifty percent of the complete governing body membership must be present. The School Governance (Procedures) (England) Regulations 2003 and School Governance (Constitution and Procedures) (England) (Amendment) Regulations 2004 set out the quorum that applies to the meetings of the governing body and its committees.

Often governing bodies are unanimous in their decision to take a particular course of action. When there is not a consensus then a vote is taken. If the governing body is equally divided on an issue then the chair of the meeting or the governor chairing the meeting has a second, casting vote.

Recording the business of the meeting

The clerk is responsible for recording the business of the meeting. Originally, the minutes were kept in a book and when approved signed by the chair. Although, some schools still adhere to this practice generally minutes are word processed and kept in a loose-leaf file, and following approval, the chair signs every page. If requested, the LA, and in religious schools the church authority, should be supplied with a copy of the minutes and records of the governing body. We will look at minute writing styles in Module 2.

Public Documents

The agenda, agenda papers, and approved minutes are all public documents and should be made available at the school for anyone to consult. However, the governing body may exclude those items which they deem to be confidential including the names of pupils, candidates for admission to the school and anyone who works, or it is proposed may work at the school. (School Governance (Procedures) Regulations 2003 provide clarification). Ofsted inspectors will ask for copies of these documents.

A few local authorities ask their schools to deposit minutes of meetings in the public library, or in the record office as part of the historical record of the county or borough. You will need to ask about previous practice and whether the governing body wishes to change that practice in future.

**Delegating
responsibility**

Governing bodies have a great many statutory duties, which may seem to be overwhelming at first. A governing body may choose to delegate some of its functions to the headteacher, an individual, or a committee unless they cannot legally do so. See the current regulations relating to the procedures for school governance for precise detail. Any individual or committee to whom a decision has been delegated must report to the governing body about any action taken or decision made.

Particularly on small governing bodies, managing the work of the governing body requires considerable thought and a high degree of co-operation among members of the governing body.

There are several options.

1. The full governing body attends to all the business apart from those matters, which by law must be delegated to a committee.
2. The full governing body sets up a committee structure and delegates powers in accordance with the law, to those committees. The committees then report to the full governing body on the decisions they have taken.
3. The governing body sets up working parties, which do not have delegated powers, but work to a brief agreed by the governing body. The working parties discuss and prepare plans and policies, which they then put before the full governing body as recommendations.

In addition to the above the governing body may delegate some functions to:

- the headteacher,
- the chair,
- a nominated or link governor, eg special educational needs, literacy, numeracy.

Small governing bodies may be tempted by option 1 above, but dealing with all the business in a termly meeting is impossible and could result in very long meetings even allowing for two per term.

Many governing bodies opt for 2, setting up committees to deal with discrete (or related issues) such as premises, staffing, finance and curriculum matters. Some governors will sit on two or more of these committees. When this system is working well the termly meeting is much more focussed and the workload is shared among the governors. Governing bodies should consider the number of committees they set up very carefully as attending all of these committees can add considerably to the headteacher's workload.

Option 3 can work well. Working parties can be set up to complete a specific task and they are a means of getting things done. In cases of urgency the chair can exercise any power, which can be delegated to an individual or a committee, or if the chair is unavailable the vice-chair can do likewise. A case of urgency is where the chair is of the opinion that a delay in exercising the function would be likely to be seriously detrimental to the interests of the school, or to the interests of any pupil at the school, or his/her parent, or a person who works at the school. (See the current school governance regulations).

**Recording
Delegated Powers
and Duties**

As clerk you will need to record in the minutes what has been delegated and to whom. You may also need to prompt the chair to request reports to the full governing body meeting from committees or individuals with delegated powers.

Governing Body Committees

Committees of the governing body, sometimes erroneously referred to as sub-committees, operate according to similar rules as the full governing body. Governors must be notified of meetings and sent the agenda papers at least seven days in advance, and minutes must be written and approved. The governing body can appoint (with or without voting rights) associate members who give their views and advice. Governors cannot be disqualified for non-attendance at committee meetings.

Delegated Powers

Arrangements for delegating decisions to a committee are set out in Part 4 of the Procedures Regulations. The regulations require a minimum quorum of three governors to take decisions. The Procedures Regulations apply to all committees established by the governing body other than those dealing with appointments, grievance, conduct, discipline, capability, suspension or dismissal of staff. Arrangements governing these issues are covered by the 2003 Staffing Regulations and associated guidance.

**Appeal
Committees**

Many small governing bodies have three governors who form an appeal committee and those three governors take no part in any committee whose decisions can lead to an appeal. The same situation applies to headteacher performance management review where one governor only acts as a review officer.

**Terms of
Reference**

The governing body should agree 'terms of reference' for each committee. Terms of reference state the membership, quorum, frequency of meetings, delegated powers, and other duties and tasks. The terms of reference and membership for each committee should be reviewed annually. As clerk to the governing body you will need to

include the annual review of terms of reference on the appropriate agenda. In Table 1.2iii, below, a proforma is given for drawing up the terms of reference for committees.

Table 1.2iii		
Terms of Reference		
Committee Name		
Guidance		Terms
Membership	<ul style="list-style-type: none"> The number of governors on the committee and their names. The names of any associate members and whether or not the governing body has agreed voting rights. The headteacher can attend any committee except where the regulations specifically require his/her withdrawal. Arrangements for the election of the chair. 	
Quorum	<ul style="list-style-type: none"> How many members of the committee need to be present for it to be quorate must be specified (which must not be less than three governors). The presence of the headteacher can also be specified as necessary for the committee to be quorate. 	
Meetings	<ul style="list-style-type: none"> How often the committee will meet unless it is a standing committee that meets as necessary (eg to hear appeals). 	
Delegated Powers	<ul style="list-style-type: none"> Check the restrictions on delegation of functions in School Governance (Procedures) Regulations 2003. 	
Tasks	<ul style="list-style-type: none"> List the tasks the governing body has agreed the committee should fulfil. 	

Adapted from: Tool Kit (AGIT 1997)

Working Parties

These are different from committees in that they are set up to complete a task or set of tasks on behalf of the governing body and do not have delegated powers. Once the tasks are completed then the working party ends. Working parties do not need to follow the same rigorous procedures as a governing body and its committees do, but they do need to be given a clear remit by the governing body.

A working party needs a convener, agreed membership, and a written set of tasks. It should keep a record of its business and account to the full governing body meeting.

Assessment

Turn to the Assessment Book and compete assessment activity 1.2iv and 1.2v.

Ensuring Good Governance

Generally speaking the relationships in governing bodies work well and governors fulfil their public duties. Most governors do take into account the implications of their role in relation to the future of the pupils, staffing, the budget, and the governing body relationships with the school and the wider society. Over the years the conduct of a few governors has been a cause for concern. Most instances arise out of a misunderstanding by governors of their roles, and its interface with the professional roles of the staff. However, these instances have led to a call for a 'Code of Practice for Governors' from among others headteacher and teacher organisations, and local authorities. While the overall content has long been agreed locally, there has been considerable national discussion about the detail.

A significant number of governing bodies have codes of conduct that are based on 'The Seven Principles of Public Life from the Committee on Standards in Public Life' (The Nolan Committee) (May 1996). See Appendix 2.

Most codes of conduct include the following areas:

- General,
- Commitment,
- Relationships,
- Confidentiality,
- Corporate Behaviour.

The clerk has a key role to play in ensuring the governing body is aware of good practice in working together, so we will use these headings to explore the notion of good governance.

General

Good practice depends on all members having a clear understanding of the core purpose of the governing body. The clerk needs to reflect this purpose in the minutes. It can be summed up in four bullet points:

- determining the aims and values of the governing body;
- monitoring and keeping under review the broad policies, plans and procedures within which the school operates;
- ensuring local accountability;
- insisting that the best interests of all pupils are paramount in decision-making.

Reflect a moment on the three roles discussed earlier. Can you identify them in those four bullet points?

Fundamental to the governing body working together well is the recognition by all members of the following points.

- The headteacher is responsible for the implementation of policy, internal organisation and management of the school and the implementation of the curriculum.
- Valuing different perspectives, and accepting that all governor stakeholder groups have equal access to information and all share a concern for the welfare of pupils.
- Governors have a collective responsibility and can only act as individuals when the governing body has given delegated authority to do so. In certain circumstances, only the Chair has the legal authority to act on behalf of the governing body in matters of urgency.
- Governors, collectively and individually have a responsibility to act fairly and without prejudice.
- The governing body either has, or shares, a responsibility for staff and must fulfil all reasonable expectations of a good employer.
- The governing body is accountable and will demonstrate in their work open governance and effective communication.

Commitment

It is important that all governors, and particularly new governors, recognise that the commitment involves:

- caring about the school's standards and seeking to help the school improve;
- significant amounts of time and energy in preparing for and attending meetings;
- attending meetings regularly and accepting a fair share of responsibilities and committee work;
- getting to know the school well and taking up opportunities to be involved in school activities;
- participating in collective and individual training and development.

Relationships

Clerks should be aware that tensions could develop between governors with different perspectives, and/or the governing body and the staff. A governing body which is working well will:

- work as a team;
- have developed effective working relationships with the headteacher, staff and parents, the local authority and other relevant agencies and the local community.

Confidentiality

Confidentiality is vitally important, and when relationships breakdown in governing bodies confidentiality can be one of the factors at the centre of the problem. There are three issues surrounding confidentiality.

- discussing matters relating to individual staff or students;
- discussing potentially contentious issues affecting the school outside the governing body;
- dissemination in the community of information that may not be confidential but is sensitive.

The clerk needs to:

- before a meeting, identify which items need to be treated with care and alert the chair to emphasize the confidentiality aspect of the discussion;
- during the meeting, take care in advising on, and recording confidential or sensitive items;
- after the meeting, take care to identify confidential items when writing and publishing the minutes.

In Module 2, Clerk as Administrator, we will explore the recording of confidential items in the minutes.

Corporate Behaviour

As stated earlier the governing body has a collective responsibility. To avoid misunderstandings, governing bodies are strongly advised to agree protocols of conduct, to include:

- encouraging all governors to express their views in meetings, but once the majority have reached a decision all governors will support that decision in public and in private outside the governing body.
- recognising that governors will only speak on behalf of the governing body if specifically authorised to do so.
- in making or responding to criticism or complaints affecting the school, governors must follow the procedures established by the governing body and agreed with the headteacher.
- in discharging their duties governors should always bear in mind their responsibility to maintain and develop the ethos and reputation of the school.

Troubleshooting

The majority of governing bodies work well, but what happens when problems arise?

Informal

Informal discussions to identify and talk through differences and misunderstanding may smooth relations. Training aimed at building the governing body as a team may be another way forward. If all else fails then suspension or removal from office, where possible, may be necessary.

Suspension

In certain circumstances the governing body may suspend a governor for all or any meetings of the governing body or its committees for a fixed period of up to six months. The grounds for suspension are one or more of the following:

- (a) the governor is employed at the school and is subject to disciplinary proceedings in relation to his/her employment;
- (b) the governor is the subject of proceedings in any court or tribunal, the outcome of which may be that he/she is disqualified from holding office as a governor;
- (c) the governor has acted in a way which is inconsistent with the school's ethos and has brought or is likely to bring the school or the governing body or his/her office into disrepute;
- (d) the governor has breached the duty of confidentiality to the school or the staff or its pupils.

(See School Governance (Procedures) (England) Regulations 2003.)

Removal

LEA and foundation governors may be removed from office by those who appointed them. The governing body may remove from office community governors and sponsor governors. The governing body may also remove any parent governor it has appointed, but it may not remove any elected governor. Procedures for the removal of governors are set out in the School Governance (Constitution) (England) Regulations 2003.

Unit 1.3

The Language of School Improvement

Introduction

School and curriculum organisation, teaching, learning and assessment are often discussed in governing body meetings. Jargon including acronyms is frequently used in these discussions. They are second nature to many of the teaching staff, but can leave governors quite at a loss. In training all governors are encouraged to always ask when a word or acronym is used that they do not understand. The clerk will need to write the minutes, the public record of the meeting, in plain English. In this unit we look inside the professional world and explore the language of education.

School Systems

A pupil's first year in compulsory education is the Foundation Year and their final year, Year 11.

In the majority of local authorities schools are organised into primary and secondary with pupils transferring to secondary at age 11. A few authorities operate a three-tier system with first, middle, and high schools with pupils changing schools at age 7 and 13. However, transfer from middle school does occur at age 12 in some education authorities.

Key Stages

The curriculum is compulsory for ages 5 to 16 and is organised in to four stages, known as key stages (KS):

Stage	Ages	Years
Foundation	4	Reception
1	5 - 7	1 - 2
2	7 - 11	3 - 6
3	11 - 14	7 - 9
4	14 - 16	10 - 11
Post 16	16 - 19	12 - 13

Curriculum

National Curriculum

The school curriculum comprises all learning and other experiences that each school plans for its pupils. “The National Curriculum is an important element of the school curriculum.”³

The National Curriculum applies to pupils of compulsory school age in:

- community schools (including special schools);
- foundation schools (including special schools);
- voluntary aided and voluntary controlled schools.

Aims

Underpinning the National Curriculum are the twin aims for all pupils of:

- providing opportunities to learn and to achieve;
- promoting pupils’ spiritual, moral, social and cultural development and preparing for the opportunities, responsibilities and experiences of life.

Purposes

It is acknowledged that while the curriculum changes in response to changes in society, the economy and the nature of schooling itself, the purposes do not change. These purposes are:

- to establish entitlement;
- to establish standards;
- to promote continuity and coherence;
- to promote public understanding.

Inclusion

Inclusion is a process through which schools meet the educational needs of a diverse pupil population by analysing teaching and learning and so removing barriers to learning. A strong emphasis is placed on the inclusion of all pupils in effective learning. Schools are required to consider the following three principles in their curriculum planning at all levels:

- setting suitable learning challenges;
- responding to pupils’ diverse learning needs;
- overcoming potential barriers to learning and assessment for individuals and groups of pupils.

Planning

Teachers write a long-term plan for each year in which they outline what they are going to teach term by term. The term plan is more detailed and often includes lists of resources and assessment opportunities. The detail of each lesson is in the daily planning which is frequently done week by week. Teachers will refer to planning particularly in curriculum committee meetings.

³ The school curriculum and the National Curriculum: values, aims and purposes. The Queen’s Printer and Controller of HMSO. Reproduced under the terms of HMSO Guidance Note 8.

Assessment

To measure pupil progress teachers need to know each pupil's starting point.

National Tests

Foundation Stage Profile introduced in September 2002 occurs towards the end of a pupil's first year in school (the Foundation Year in the reception class). It gives the school a nationally comparable picture of each pupil's stage of development. National Curriculum Assessments at the end of each key stage measure the progress each child has made during the key stage. At the end of Key Stages 1, 2, and 3 these tests and tasks are in English, Mathematics, and Science.

Public Examinations

At the end of Key Stage 4 the majority of pupils sit the General Certificate in Secondary Education (GCSE) examinations in a range of subjects including English, mathematics and science. Increasingly some pupils take other qualifications such as General National Vocational Qualifications (GNVQ).

Post 16 the main public examinations taken are General Certificate in Education (GCE) AS and Advanced Level referred to as A2 and General National Vocational Qualification (GNVQ).

At the time of writing, a proposed new framework for achievement for young people and adults is under consideration.

Purpose

Assessment of pupils' attainments takes place for different purposes:

- formative assessment is intended to help pupils along the way by telling them what they are doing well and how they might improve
- summative assessment takes place at the end of a block of work and summarises their attainment. End of key stage assessments are summative.

League Tables

Comparisons between pupils and between groups of pupils in different schools are made on the basis of Standard Attainment Tests and Tasks. The school's position in these tables is of concern to governors, because they are used by some parents to choose a school for their child. However, increasingly schools are making use of value added data to help them evaluate the success of their teaching and learning strategies.

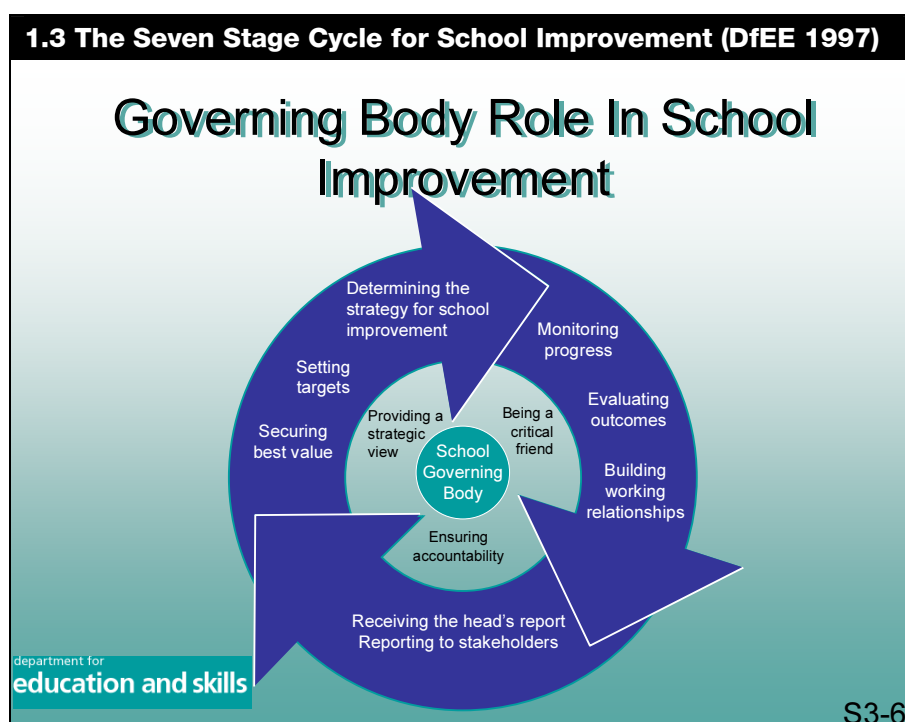
Special Educational Needs

Day-to-day assessments of individual pupils and groups of pupils help teachers to plan appropriate work for pupils with different learning needs in the next lesson. Pupils identified as having a special educational need (SEN) will probably have an individual education plan (IEP), which gives the targets the pupil needs to achieve. Teachers use IEPs in planning work for pupils with special educational needs. The

governing body is responsible for ensuring that the needs of these children are identified and met. Most governing bodies appoint a governor with the specific responsibility for liaising with the Special Educational Needs Co-ordinator (SENCO) to monitor the educational provision for these children.

Target Setting

This is a process intended to lead to improvement in levels of literacy and numeracy nationally. It is an annual cyclical process which links government targets, to local authority, school and the performance of individual pupils. It begins by the school asking the question, How well are we doing? It is illustrated in Diagram 1.3



Recording Curriculum Discussions and Decisions

Local authorities - receive collective targets from the QCA for their schools for the coming year. Local authorities provide their own analyses of national assessment data to schools to enable them to set their performance in the local context.

Schools - set targets negotiated with the local authority using information provided by the local authority and national data from The Autumn Package, sent to all schools each year. The local authority ensures that the collective performance of schools meets its targets. Headteachers collect together previous year's results and benchmarking information from The Autumn Package and teacher forecasts.

Teachers - heads of department and co-ordinators work with classroom teachers to forecast their pupil's performance based on evidence and realistic expectations. These forecasts might be for two years hence giving time for teachers to work with pupils and parents to achieve, or exceed the targets.

Pupils - review their own performance and with teachers and parents set targets to improve it for literacy and numeracy. Governors approve the targets recommended by the headteacher and teaching staff.

It is important to note that in a year group of 50, each pupil = 2%. Therefore, in small year groups one child can have a significant impact on the outcomes of end of key stage national assessments. If the year group is so small that the performance of individual pupils can be identified, then the assessments should not be included in any public documents eg minutes of governing body meetings, School Profile etc.

Governors, headteachers and senior managers have little room for manoeuvre in the targets they set. Their task is planning the educational provision to meet the national numeracy and literacy targets. It may also require setting targets to improve attendance, attitudes and behaviour.

The governing body also has a specific responsibility for monitoring the implementation of the literacy and numeracy projects. Some governing bodies appoint nominated or link governors to act as 'critical friends' in relation to literacy and numeracy. As clerk you will need to prompt the chair to place reports from the literacy, numeracy, and special educational needs governors on the agenda. The governing body is responsible for the approval of policy in relation to sex education.

It approves the pupil targets for the coming year and monitor progress through visiting classrooms and receiving the results of the National Curriculum Assessments and public examinations.

Much of the curriculum decision-making is a matter for the professional staff; however, governors are interested and concerned about teaching and learning and will receive reports which assume the clerk understands school and curriculum organisation and its aims and purposes.

Assessment

Turn to the Assessment Book and complete assessment 1.3i and ii.

Workforce Remodelling

Teachers are contracted to work for 1265 hours per year plus such additional hours needed for the effective discharge of professional duties. Teachers frequently work longer hours during term time and prior to September 2003 undertook many clerical and administrative duties in addition to those of a teacher. The work life balance of teachers became an issue of concern to educationalists and school governors alike.

In September 2003 the first of three phases of contractual changes of a National Agreement to remodel the workforce in schools was implemented. In this first phase the requirement for teachers to routinely undertake clerical and administrative tasks was removed. The second phase, which came into force in 2004, limited to 38 hours per year the time a teacher could be required to cover for absent colleagues. The final phase introduced in September 2005 guarantees 10% professional time for planning, preparation and assessment (referred to as PPA time) within timetabled teaching time. New invigilation arrangements and dedicated headship time have been introduced.

Governors are responsible for the work life balance of the headteacher and have a responsibility for ensuring and monitoring the introduction of the National Agreement⁴. The agenda and minutes of governing body and committee meetings need to reflect progress with the introduction and embedding of workforce remodelling.

Inspection

Her Majesty's Chief Inspector for Schools (HMCI) is the head of the Office for Standards in Education (Ofsted) and is responsible for inspecting the standards of education in England's schools.

From September 2005:

- Schools will be inspected once every three years (more frequently for schools causing concern) for no more than two days and will receive only a few days notice. The exception will be where the local authority or HMI decide to inspect the school for a special purpose.

⁴ National Remodelling Team (2004) Workforce Remodelling – a Guide for Governors III.

- The inspection team will be small and may be led by one of Her Majesty's Inspectors.
- The inspection team will concentrate on closer interaction with senior managers in the school, taking self-evaluation evidence as the starting point. Schools are strongly advised by Ofsted to update their self-evaluation form on an annual basis.
- HMCI will publish and be responsible for all reports; however they will be distributed to parents and pupils by the school.
- Schools with difficulties will be classified as requiring 'special measures' or where there are weaknesses in the progress of pupils or in key aspects of the school's work given the school will be placed in a new category .."a school requiring significant improvement".
- Local authorities will be required to prepare a statement of action that the authority proposes to take where a school is placed in 'the special measures' category. The statement must be sent to HMCI, the governing body and the bodies which appoint foundation governors, if any. Schools are not required to prepare a specific action plan.

Previously referred to as Section 10 Inspections from September 2005 they will be known as Section 5 Inspections because under Clause 5 of the 2005 Education Act HMCI has a duty to arrange periodic inspection of all maintained schools. HMCI is also required to report on each school inspected using the same six criteria used to keep the Secretary of State informed about aspects of education.

1. quality of education;
2. educational standards achieved;
3. quality of leadership and management including whether financial resources are managed efficiently;
4. spiritual, moral, social and cultural development of pupils;
5. how far education provision in schools meets the needs of the range of pupils at those schools; and the contribution made by schools to the well-being of pupils.

Framework for Inspection

In this Unit we will look at what the inspectors do and how it affects the governing body, and how an inspection might affect the work of the clerk.

The Framework for Inspection is a document which details how inspectors should go about their work of providing evidence to support their answer to the questions:

"How well is the school doing and why?"

"Is the school capable of managing its own improvement?"

All schools should have a copy of the 'Framework for Inspection'.

The Governing Body's Role

In relation to the inspection the governing body has responsibilities and it may require the clerk's assistance with some of these tasks.

The list of tasks are:

- ensuring that the school's self-evaluation form is updated at least annually;
- informing the parents, staff and others of the impending inspection;
- inviting registered parents of registered pupils at the school to inform HMCI of their views on matters relating to the school;
- organising a governor representative to meet with the inspector to discuss the self-evaluation form and the role which governors have had in self-evaluation, planning for improvement, and monitoring and evaluating the implementation of the key priorities for improvement;
- organising a governor representative to receive feedback from the inspectors at the end of the inspection;
- three weeks after the end of the inspection a report will be copied to the headteacher, governing body, local authority (maintained schools only), appointing body for foundation governors, and Learning Skills Council for schools with pupils over compulsory school leaving age. The governing body must ensure that every parent of a registered pupil receives a copy of the report;
- distributing a report appropriate for the school's pupils, which will be copied to the school's council (secondary, primary, nursery and special schools) for distribution to all pupils. Governors will need to monitor that every registered pupil has received one.

One of the areas which the inspectors will collect evidence about is:

- how well is the school led and managed, including the governing body's role in strategic leadership?

Judgements

In making judgements about the work of the school inspectors collect evidence to answer the following questions:

1. How well do learners achieve?
2. How effective are teaching, training and learning?
3. How well do programmes and activities meet the needs and interests of learners?
4. How well are learners guided and supported?
5. How effective are leadership and management in raising achievement and supporting all learners?

The inspectors will also be seeking evidence to judge how the school is addressing the five key well-being outcomes for children which are:

- staying safe;
- being healthy;
- enjoying and achieving;
- economic well-being;
- making a positive contribution.

Evidence

The evidence upon which they will need to make these judgements comes from the self-evaluation form and other documentation and discussions with governors, particularly the chair

Governors need to be able to account for:

- how effectively performance is monitored and improved through quality assurance and self-assessment
- how effectively leaders and managers at all levels set clear direction leading to improvement and promote high-quality care, education and training
- how well equality of opportunity is promoted and discrimination tackled so that all learners achieve their potential
- the adequacy and suitability of staff
- the adequacy and suitability of specialist equipment, learning resources and accommodation
- how effectively and efficiently resources are deployed to achieve value for money

and, where appropriate:

- how effective are the links made with other providers, services, employers and other organisations to promote the integration of care, education and any extended services in schools to enhance learning
- the extent to which governors and other supervisory boards discharge their responsibilities.
- The agendas and minutes of governing body meetings are sources of evidence to support how well governors discharge their duties.

Documentation

The main documents which the inspectors will ask to see are:

- previous Post Inspection Action Plans
- agendas and minutes of previous meetings, including committees
- policy documents
- School Profile and if not available yet for 2005, the Annual Report to Parents 2004
- School Prospectus

Discussion

The discussions with governors, headteacher and staff will seek to make judgements on the following:

- the way the governors exercise their strategic, critical friend and accountability roles;
- how well they fulfil their statutory duties;
- how they help to shape the direction of the school;
- their knowledge of the strengths and weaknesses of the school and understanding of the challenges it faces;
- whether appropriate priorities for development and improvement are set;
- how well they have responded to previous inspection findings;
- how governors find out for themselves how things are going;
- whether or not they take responsibility for good and poor aspects of the school.

School Improvement Plan/Inspection Reports

When the inspectors write their report, one section will list the Main Findings. The governing body must respond to the inspection report by addressing the main findings in its school improvement plan.

Faith Schools

In voluntary controlled, voluntary aided and foundation schools, which have been designated by the Secretary of State as having a religious character, religious education (RE) is inspected by an inspector chosen by the governing body. RE inspectors are not trained by Ofsted, but by the church authority. The inspectors must provide the governing body with a report, and a summary of it within a specified period.

- The governing body is responsible for making the report available to the general public and for sending a summary free of charge to the parents of all the pupils who receive denominational RE, in the school.

Assessment

You have now completed the three units of Module 1. The final assessment is 1.3iii.

Module 2

Clerk as Administrator

How clerks are perceived by the governing body depends on their experience of clerking. The administrator role is the one most easily identified and encompasses many of the visible tasks of the clerk which are described in School Governance (Procedures) (England) Regulations 2003 and School Governance (Constitution and Procedures) (England) (Amendment) Regulations 2003, and 2004 and can be summarised as follows:

In accordance with the regulations the clerk will:

- (a) convene meetings of the governing body;
- (b) attend meetings of the governing body and ensure minutes of the proceedings are produced;
- (c) perform such other functions as the governing body may require.

The two units of work within this module encompass the competences that clerks require to fulfil the above functions. These are supported by video clips and interactive material on CD ROM.

The first unit is concerned with preparing for a meeting. Communication skills are critical to the work of an effective clerk. The clerk needs to have good listening, speaking, and telephone skills and this is why we begin with a telephone conversation. Written communication skills are important and as is demonstrated in a later module, so is the skill of speed-reading.

The focus of the second unit is what happens in a meeting. We take a look behind the scenes at what happens before the meeting, and then when the curtain opens join Winsom Governing Body for a full governing body meeting. What does the clerk do in the meeting and after the meeting?

Finally, we explore the issue of health and safety from the perspective of the clerk. For example, school governing bodies often meet in the evening, and in rural areas the clerk may have a long journey home. Safety at work, and on the way to and from work, is important for the clerk to the governing body.

Unit 2.1

Meeting Preparation

Introduction

Good communication skills are critical to the work of a clerk. A clerk needs the ability to explain a point clearly and concisely, and also to listen to the business of the meeting, analysing what is being said and taking notes of all that is relevant.

Telephone Conversation

A telephone conversation gives the opportunity for us to take a light hearted look at listening and speaking in an exchange between Michelle Goodhead, the headteacher of Winsom School and Matt Clerk, the clerk to the governing body.

Watch Interactive CD ROM G

The CD ROM demonstrates several points:

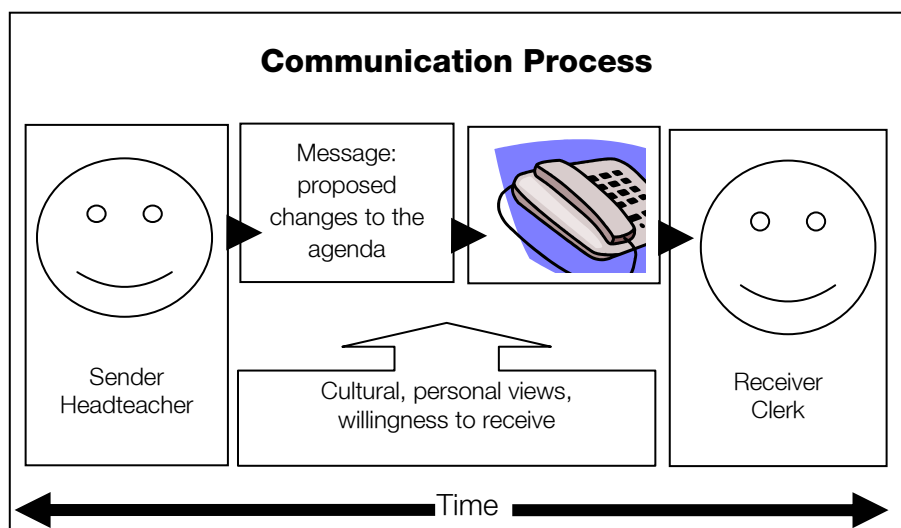
- When telephoning a school or other organisation the formal approach of stating who you are, who you would like to speak to and why is the most efficient way of gaining access to a person.
- A message from the headteacher to telephone is likely to require the clerk to have the governing body file. Always be prepared with relevant documents to hand.
- Finally, although the headteacher is in a hurry, the clerk uses assertiveness skills to make sure he has fully understood the proposed changes to the agenda.

Sender/Receiver

To communicate requires a SENDER and a RECEIVER and in between is the MESSAGE and the MEDIUM by which it is sent. Communication takes place within a context and over a time period.

Communication

In the interactive video clip the sender is Michelle Goodhead, the headteacher and the receiver Matt Clerk, clerk to the governing body. Cultural factors, personal views and the willingness of the receiver to understand are all factors which influence the accuracy with which the message is transmitted and received.



Medium

The telephone allows instant communication but without the information transmitted by body language and facial expressions in a face-to-face communication. Email provides faster written communication but like traditional letters, voice intonation and interaction information is lost.

The context is the environment in which the communication takes place. In this case, Matt Clerk, when making the call to the headteacher knows the context; in Option 2 he plans for the call and has the school's documents to hand.

There are three main messages:

1. be prepared with the school file before making the phone call.
2. speak clearly and fully introduce yourself.
3. be assertive and make sure that the message is fully understood before ending the call.

Email

While the conventions of letter writing are taught in school, and are generally followed world wide, the introduction of email has enabled people to send short messages as though they are having a conversation, and there is a tendency to disregard, grammar and spelling. This makes the message very difficult for the receiver to understand. What problems do you encounter in reading the following message:

“enclosed is the daft action plan for next moday meetin I apologise should have sent it sooner look foward to seeing you then”

Earlier the willingness of the receiver to receive the message was referred to. Did you find yourself willing to receive a message, which did not follow the conventions of spelling and grammar? In all communications the sender must consider the needs of the receiver, if the message is to be transmitted efficiently and effectively.

Letters

All letters drafted on behalf of the governing body should follow formal business letter writing conventions, and include the following:

- if not being sent on school headed notepaper, the school should be clearly identified;
- address of the sender;
- address of the person to whom the letter is being sent;
- date;
- statement of the subject of the letter;
- matching salutations: Dear Sir/Madam Yours faithfully
 Dear (person's name) Yours sincerely

When drafting a letter for the chair you will need to agree with him/her the address of the sender. This may be to the chair at the school address, but in some cases this will not be convenient so the reply may be to the chair's home address. In other situations the reply may be to the clerk at either school or business address. If action is to be taken, these details need to be attended to.

Speed Reading/Scanning

These are two related, but different skills and you may use a combination of both to get an understanding of a long document. Some documents provide an executive summary giving an outline of the main points and conclusions. This is very helpful in directing you to those sections that are specifically relevant to your governing body. Most documents set out what is to be discussed in the introduction and summarise the main points in the conclusion. Usually the paragraphs in between have headings, which relate to the introduction. **Reading the introduction, paragraph headings and the conclusion will help you to quickly identify the sections you need to read in detail.** Clerks should note that summaries and interpretations are no substitute for the original Regulations or Acts of Parliament when a point of law is involved.

Tasks before the Meeting

Before the meeting there are three important tasks identified in the National Job Description. The clerk to the governing body will:

- work effectively with the chair and headteacher before the governing body meeting to prepare a purposeful agenda which takes account of DfES, local authority and church authority issues, where appropriate and is focused on school improvement;
- encourage the headteacher and others to produce agenda papers on time;
- produce, collate and distribute the agenda and papers so that each governor, the headteacher and any associate governor has at least seven clear days notice in advance.

Working Effectively with the Chair and Headteacher

It is important that the clerk has good relationships with all members of the governing body and particularly with the chair and headteacher. As clerk to the governing body, it is important to recognise that your loyalty is to the governing body. For clerks who are employed in another capacity in the school, it is important that **all** understand that the work of clerk to the governing body is an entirely separate duty and responsibility which requires appropriate recognition in terms of time given to supporting the governing body. This understanding is critical to good relationships and effective working practices.

At some time everyone is new to a job, and as clerk it is for you to work with a new chair, and/or a new headteacher to assist them in understanding their own and your respective roles in relation to the governing body. A meeting with a new chair and/or headteacher prior to their first meeting in which you discuss with them how the governing body operates and how you can support its work is an important first step. The Model National Job Description is a good starting point for introducing the chair and/or headteacher to your role and responsibilities. At the first meeting you may also wish to discuss how and when to communicate over matters of business.

Agenda

The chair is responsible for finalising the agenda for meetings and the headteacher is responsible for the implementation of the governing body's strategic aims, policies and plans, therefore both will have important contributions to make to the agenda. As clerk you will need to have:

- reviewed the minutes of the previous meeting and identified all items to be referred or reported to the next meeting;
- identified committees that have met since the last meeting and whose minutes will need to be received by the full governing body;
- noted policy documents and plans which need to be referred to the full governing body for ratification;
- identified working parties which need to report to the full governing body;
- collated new items of business that have arrived between meetings.

Core agenda

Working with the chair and headteacher can take different forms. While some clerks may have a meeting with the chair and head others may use the telephone, or email to agree the content of the agenda. Where the clerk has a good understanding of the work of the governing body and of the school, a meeting is not essential.

Some local authorities produce basic agenda, or core agenda with the standard items of apologies for absence, minutes of the previous meeting(s) and matters arising, followed by a list of recommended items for the coming meeting. Sometimes these are organised according to school improvement or other criteria. These core agenda are used by local authority-based clerks providing a service via a Service Level Agreement and may be sent to those schools not clerked by the local authority.

Some governing bodies find core agendas very helpful and really appreciate this aspect of a local authority service while others prefer to create their own agenda. The really important point is that the chair recognises that he/she is responsible for the agenda and has the final say about what is included on the agenda, and the order in which it is placed. With a chair who does not have a clear understanding of his/her role this can lead to difficulties. However, as clerk you can request a meeting to talk through issues and even possibly draw available training to their attention.

Organising the agenda

A purposeful agenda is one which enables the governing body to focus its attention on the main tasks ie promoting high standards of educational achievement and securing the welfare of its pupils. There are several ways in which an agenda can be organised or structured. Below are two sets of agenda headings:

- **A** focuses on school improvement, which is all those items relating to improving pupil achievement, followed by items relating to staff and then to governors. It can be argued that all are concerned with school improvement directly, or indirectly.
- **B** organises items in relation to governing body roles.

A	B
Procedural School Improvement <ul style="list-style-type: none"> • Headteacher's report • Committee Reports • Working party Reports • Chair's Report • Link Governor Reports Staffing Matters Governing Body Matters Information	Procedural Accountability and Monitoring Strategic decisions/ discussions Information

Whichever way an agenda is organised, it is likely there will be overlap between headings and some items could be placed under more than one heading.

Agenda Papers

The Procedures Regulations require any reports or papers to be considered at the meeting to be sent out with the agenda at least seven days in advance of the meeting. Encouraging those responsible for reporting to the governing body, or placing documents before them for approval, to have the relevant documentation ready so that they can be despatched with the agenda seven clear days before the meeting can be difficult.

The clerk should encourage the headteacher to have his/her report ready in good time. This allows the governors time to read the report in advance of the meeting and to raise questions, make comments and take decisions on the basis of the report. This helps governors fulfil their role as critical friend and to provide accountability. The headteacher may give a verbal update. An efficient governing body does not lapse into the habit of allowing papers to be tabled at meetings, nor allow the presenters of papers to read them to the meeting in full.

Despatching the Papers

Before the meeting the clerk needs to check who can attend the meeting. Associate members are not necessarily eligible to attend all meetings. Papers should only be sent to those governors who are eligible to attend the governing body meeting. They need to be sent well in advance so that they have at least seven clear days in which to read them. If circumstances arise, beyond the clerk's control, for example, papers go astray in the post or the governor is away from home, then the meeting should go ahead.

If the papers are sent out late so that none of the governors could have had seven clear days to prepare then the meeting should be postponed, unless the chair directs otherwise (See School Governance (Procedures) Regulations 2003). Any meeting considering the removal of a chair or vice chair from office, the suspension of a governor or a proposal to close the school must be convened with at least seven days notice.

Quorum

Before the meeting the clerk needs to check the quorum given the current membership of the governing body. To take decisions a governing body must be quorate. A governing body is inquorate if less than 50% of those governors in post are present, for example, on a 19 member governing body with two vacancies there must be 9 members present including the headteacher, if the headteacher is a governor. If a governor leaves and the governing body becomes inquorate, then as clerk you must note in the minutes that the governing body is inquorate. The governing body can continue with an informal meeting at which matters are discussed, but not decided, nor minuted. However, it is appropriate for the clerk to make notes of the discussion and any recommendations for reporting to the next meeting. Those discussions and any recommendations are reported to the next meeting, but before a decision can be made all governors must have the opportunity to question and discuss the agenda items discussed in the informal part of the inquorate meeting.

Assessment

Complete assessment 2.1i Preparing an agenda.

Using School Governance (Procedures) (England) Regulations 2003 complete assessment 2.1ii. Attendance at Governing Body Meetings.

Unit 2.2

Meetings and Minutes

Introduction

During the meeting there are two main tasks for the clerk:

1. taking a record of the meeting;
2. giving advice.

The latter is the subject of Module 4. One of the most visible tasks is recording the business of the governing body - the minutes. Writing minutes is a skill that requires listening, analysing what is said, and then making notes of all that is relevant. The purpose is not to make a full verbatim record of the meeting, but provide a clear succinct record of the business conducted, decisions made, and action to be taken. Often in a meeting there are elements to a discussion that are irrelevant.

Preparing to take minutes

One way of preparing for minute taking is to use the agenda to prepare a proforma. Leave plenty of space under each agenda item for your notes. This can be extended by using the papers to write an introductory sentence about each item. For example, your proforma for the headteacher's report may read:

Monitoring and Accountability

1. The Headteacher's Report
In her report Mrs Goodhead gave an account of the following:
 - Teaching of PSHE

 - Special Educational Needs

Minutes

Minutes are the public record of the meeting and therefore need to be written in a style of language which is accessible to the majority, if not all members of the school community. Plain English is what is required. Sentences should be short with only one or at the most two clauses. Educational jargon should be kept to a minimum. Where it is necessary to use educational jargon, then on the first usage an explanation of the term needs to be given. It is good practice to write minutes in the past tense and not to refer to individual contributors by name unless specifically required to do so.

Below are two paragraphs with similar content. Make your own judgement as to which is the most accessible to the school community.

- A** *Mrs Goodhead reported that staff considered the current year group taking NC tests to be highly motivated, but that teacher INSET and the acquisition of additional resources had also had a positive impact on the quality of teaching and learning. As a result the NC tests were expected to be at least as good as last year.*
- B** *Mrs Goodhead reported that pupils taking the National Curriculum Assessments this year are expected to perform as well, if not better than the previous year group. The reasons given by staff were:*
- *pupils are highly motivated;*
 - *teachers had undertaken in-service educational training courses which had been very helpful;*
 - *the school had purchased extra resources, which had raised the quality of teaching and learning for this year group.*

Proof Reading

It is a rare person who can write and present a perfect set of minutes without a spelling, grammar, or typing error. These errors are easily spotted by governors and can lead to a clerk appearing inefficient and careless during a meeting. For those clerks who use word-processing software to produce minutes, it is important that the spell checker language is set for English UK and that only suggested changes which are appropriate are accepted. Governors may lose confidence in their clerk if frequent errors appear. Therefore, proof reading skills are another important competence of a clerk.

Confidential Items

It is usually inappropriate during full governing body meetings to discuss individual pupils, members of staff and governors. The governing body may exclude from the public record any item, which names any of the above, and any other item, which the governing body considers, should remain confidential. As clerk you will need to check with the chair any item, which you think may be deemed confidential.

Clerks should be aware that where individuals are named in confidential records the individual usually has access to information, which is about them specifically. Schools are required to conform with the requirements of the Freedom of Information Act 2000 (FOIA) to publish information about their policy on public access to information and disclosure. Any person has a legal right to ask for information held by the school. DfES has published a Model Publication Scheme which schools must adopt unless they choose to draw up their own scheme for approval by the Office of the Commissioner for Information. Further information is contained on the DfES website. Schools must have a publication scheme.

**Recording
Decisions**

“Every question to be decided at a meeting of the governing body shall be determined by a majority of the votes of the governors present and voting on the question.” School Governance (Procedures) Regulations 2003 and School Governance (Constitution and Procedures) (England) Regulations 2003, and 2004. When there is an equal number voting for and against a motion, the chair, or the person taking the place of the chair, provided he or she is a governor, has a second, or casting vote. It is critical that all decisions are clearly and unambiguously recorded. Using a set form of words such as “It was agreed that...” or “It was resolved that...” is helpful. Decisions can be presented in bold or an underlined font, so that they are easy to identify at a later date.

Assessment

Turn to the Assessment Book and complete assessment 2.2.

After the Meeting

Other than writing and distributing the minutes, how much follow-up action the clerk is expected to do will depend on the governing body and the items discussed. Some chairs like to draft all their own letters while others prefer the clerk to draft letters. Clerks are often asked to take up queries with other organisations/institutions such as the local authority, church authority or DfES.

Action Points

Effective governing bodies know what each member has to do following the meeting. The clerk can help the governing body in two ways:

- producing an action column on the right hand side of the page with the name of the governor(s) or committee or working party that has to take action at the side of the relevant point.
- producing an action sheet which is sent out to all governors following the meeting if the minutes are not going to be distributed within a couple of weeks of the meeting.

Many clerks also make an action list for themselves and check it through with the chair at the end of the meeting to make sure he/she knows exactly what has to be done and when.

Approval of the Draft Minutes

Once the minutes have been written you will need to send the draft to the chair for approval. Many governing bodies also require the clerk to send a copy to the headteacher so he/she can check for technical accuracy. Once the chair has approved the draft then the minutes can be distributed to all members of the governing body. However, they remain draft minutes until they have been approved at a meeting of the full governing body at which point the chair signs them.

Health and Safety

There are two areas of health and safety, which are specific to a clerk to a governing body. The first concerns the journey to the school, and the second the working conditions in the school.

Governing body meetings frequently take place in the evening and can continue until 10.00 p.m. Rural schools are often in areas without public transport, and some urban schools are in areas where it would not be wise to walk alone after dark. When applying for a position as clerk to a governing body it is important to consider methods of transport available, timings of the meeting and the acquisition of other personal safety items such as a torch, mobile phone and personal alarm.

In Video Clip B, Matt Clerk points out the importance of where the clerk sits in the meeting and the conditions necessary for working. You will need a table and comfortable chair, with sufficient space for papers. If the meeting is likely to be longer than two hours, then it is reasonable to negotiate with the chair for a short break at a suitable point.

On the first visit to the school you might wish to check the arrangements for evacuating the school in case of fire. Larger schools can appear to be a maze of corridors and it is helpful if the clerk knows the location of other facilities such as the toilets and first aid.

In the majority of schools safety is not an issue and the school will have a room appropriately laid out for the meeting, but as clerk you need to check that all is in order for you to do your job as effectively and efficiently as possible.

You have now completed the two units of Module 2.

Module 3

Clerk as Information Manager

The second major role of the clerk identified by ISCG in 'Clerking Matters' is that of information manager. Information is a word used colloquially in different ways, but it does have a precise technical meaning, which is the meaning we use in this module. The Oxford Dictionary states that '...information is one item of knowledge'. Knowledge is critical to all that we do, and as with all organisations it is an important asset for a governing body. Specialist knowledge is required for the effective management of the budget, staffing, premises and the curriculum. The effective governing body draws upon many sources of information and the clerk has a significant role in managing that information through the systems for recording, storing and retrieving which he/she puts in place. The first unit in this module looks at the ways in which the clerk manages information.

Increasingly, information is being provided electronically via intranets and the internet. To work effectively clerks should have access to both e-communication and the more traditional manual sources of information. In the second unit we consider the methods of storing, recording and retrieving of information in both manual and electronic formats and the legislation, which prescribe the protocols to be observed.

In the third unit the focus is on e-communication and the sources of advice available via the internet.

Unit 3.1

Managing Information

Introduction

Information, items of knowledge, are necessary to the decision making process. What information informs that process depends on what is available to a governing body at the time. Information emanates from a huge variety of sources including national and local government. Organising and storing this information is part of the role of the clerk.

As discussed in the previous module the agenda and minutes are the public record of the business of the governing body. There are other records, which as clerk you will need to maintain, some of these are in the public domain, and some relating to the members of the governing body.

Records

While the public has access to the agenda and minutes of governing body meetings and its committee meetings, as discussed in Module 2, for those meetings at which confidential items have been discussed there will be two parts to the minutes, one of which contains confidential items. Both should be very clearly labelled for as clerk you have the responsibility of ensuring that the confidential minutes do not stray into the public domain. Each governing body needs to identify an agreed method for handling confidential information.

Accessibility

The accessibility of the information in all records depends in part on how the information is recorded. The format influences its accessibility to the reader. For example, information recorded in prose can be difficult to access without signposts to tell the reader where to look for specific information. Minutes and reports are more readily accessible if headings and bullet points are used to guide the reader. Tables enable statistical information to be more easily understood and they give shape and form to a page which guides the reader through a document. While using a small size font may reduce the number of pages in a document and therefore, photocopying and postage costs, it may also reduce its readability. White space on a page is as important as the text in making the text readable. Following are some examples. Which do you think is the most accessible to the reader?

**Arial 12 pt with
12 pt space
between lines**

The focus of the report was progress with the School Improvement Plan.

- Additional literacy and numeracy training is in place.
- Two classroom assistants are undertaking the new training programme.
- Alterations to the two classrooms in the West Wing are now complete making a large computer suite.

The Collective Worship Policy has been revised and the staff are now working on a review of Personal, Social, Health Education and Citizenship.

**Arial 11 pt with
14 pt space
between lines**

The focus of the report was progress with the School Improvement Plan.

- Additional literacy and numeracy training is in place.
- Two classroom assistants are undertaking the new training programme.
- Alterations to the two classrooms in the West Wing are now complete making a large computer suite.

The Collective Worship Policy has been revised and the staff are now working on a review of Personal, Social, Health Education and Citizenship.

**Arial 10 pt with 15
pt space between
lines**

The focus of the report was progress with the School Improvement Plan.

- Additional literacy and numeracy training is in place.
- Two classroom assistants are undertaking the new training programme.
- Alterations to the two classrooms in the West Wing are now complete making a large computer suite.

The Collective Worship Policy has been revised and the staff are now working on a review of Personal, Social, Health Education and Citizenship.

As clerk you may want to consult with the governing body to find out if it has any preference. For some governors consideration might need to be given to providing information in alternative formats.

As clerk you may, in addition, wish to store copies of the minutes in electronic format, if so you will need to ensure that only the version approved by the governing body, is stored. It is inadvisable to make electronic copies available to anyone else unless you have the software to change the file into portable document format (PDF). In this format the electronic copy cannot be changed either accidentally or otherwise. With the increasing tendency to create records in all areas of public life to meet legal requirements and the large amount of space required to store those records, it is increasingly likely that records will be stored in electronic format. This is a trend you will need to monitor and discuss with the governing body as to how it wishes to proceed.

**Storing
Information**

Stored information is only valuable to an organisation if it can be efficiently retrieved to inform the decision making process. The filing system for storing information should be determined by the governing body. A starting point is the list of what records need to be kept, and where to keep them. It is inadvisable for a clerk to store any records at home other than those, on which he/she is currently working. Ideally a filing cabinet within the school should be available for governing body records, so that they can be readily accessed by the clerk, chair and headteacher.

**Retrieving
Information**

Filing systems are only as efficient as the people who construct them and use them. If records are incorrectly filed, then retrieving information will be a time consuming and inefficient process. To help you with this task you may find a loose-leaf file or book in which you keep a note of all the records with the dates for review and location, useful. For example, the school's policies may be kept together in the head's office or staffroom, or they may be available electronically on the school website. It is helpful to have a sheet listing all the policies with a date for review. Where they have been delegated to a specific committee or individual that information should be recorded also.

The governing body will need a policy that states the basic principles and procedures to be followed. Points to be considered are:

- there is a legal requirement for financial records to be retained for a period of seven years.
- the local authority, and/or church authority may require records to be retained for a specific period of time.
- storage, retention and retrieval.
- Data Protection and Freedom of Information requirements.

Archiving

One problem with records is that they accumulate and at some point a decision has to be made as to what to do about 'old records'. It may be useful to seek advice on this matter. Where there is no advice forthcoming, you will need to discuss with the chair and headteacher the principles and procedures to be followed and draw up a policy statement for the approval of the governing body. A policy may state that all records are to be kept for a period of seven years, and then unless there is a compelling reason to retain the records for a further period, public records should be deposited at the Local Record Office. Where records are no longer required the governing body should bear in mind the need for careful disposal.

Legislation

As has been stated previously the governing body operates within a legal framework. Much of the legislation is contained within Education Acts; however, there are other Acts of Parliament from outside the

educational arena which impact on the work of the governing body. Currently, relevant legislation is listed at the end of each chapter of 'A Guide to the Law for School Governors'. This document is only a starting point and at times you may need to seek advice from the local authority Governor Support Unit, the DfES, Governorline or church authority, where appropriate, on how specific legislation applies to given situations.

In addition to the regulations and Acts of Parliament dealing with school governance, there are also three Acts of Parliament of which you will need to be aware:

- Data Protection Act 1998
- Freedom of Information Act 2000
- Copyright, Design and Patents Act 1988.

Clerks will need to keep abreast of changes and developments to legislation and local authority policy, via the DfES website, their local authority and where appropriate the diocesan/church authority.

Data Protection

In keeping records you will need to observe the requirements of the Data Protection Act 1998 which refers to:

- personal information which is being processed, or intended to be processed, by means of equipment operated automatically.
- information which is recorded as part of a relevant filing system, or with the intention that it should form part of a relevant filing system.

Therefore databases and manual records containing governors' names and addresses and other personal information are subject to the Data Protection Act. The Act requires the data controller to register all databases in which the data stored about individuals is such that they can be identified. Each school is responsible for registering with the Data Protection Registrar. Advice on registration can be obtained from your local authority. The information required is likely to be a list of the databases and the categories of data being held eg governors' address list: name, address, telephone number, email address.

Freedom of Information Act 2000 (FOIA)

The legislation applies to Public Authorities and Public Companies. The governing body of a maintained school is subject to the regulations applied to Public Authorities which concerns the obligation to make available to an individual the information stored in databases and/or filing systems about them, and the right of that individual to contest the information. It is important that the chair and the headteacher know what information you are storing about governors, and to avoid any misunderstandings you may wish to make available to all governors a list of the records and the categories of data held, eg attendance register, names and dates of meetings attended.

The aim of the FOIA is to promote a culture of openness and accountability amongst public sector bodies, and therefore improve public understanding of how public authorities (which includes the governing bodies of schools) carry out their duties, why they make the decisions they do, and how they spend public money. Schools are under a duty to provide advice and assistance to anyone requesting information. Requests should be dealt with within 20 days, excluding school holidays. (For further information see DfES website.)

**Copyright, Designs
and Patents Act
1988**

In making information available to the governing body you may be asked to photocopy documents. You will need to check whether or not they are copyright free. Copyright is a property right and is denoted by the author or organisations name, the copyright symbol © and the date, usually at the end of a short document and for longer documents at the bottom of each page.

The current legislation relates to:

- (a) original literary, dramatic, musical or artistic works,
- (b) sound recordings, films, broadcasts or cable programmes, and
- (c) the typographical arrangement of published editions.

The copyright law is based on two principles. The first is that any of the above is the 'fruit' of the labours of the author, and therefore they are entitled to remuneration for their labours. The second is a moral principle concerning acknowledgement of the author of any material copied.

Before copying any material it is important that you check its copyright status. If it has a copyright statement then you may only make one copy for study purposes. Many documents on the World Wide Web eg government publications can be printed off for use by a governing body. Local authority documentation may be copyright free, and other documents may be made available under a licence copy purchased by the local authority.

The above legislation can all be found on the Her Majesty's Stationery Office (HMSO) web site along with all other Acts of Parliament. The address is <http://www.legislation.hmso.gov.uk/acts>.

Assessment

At this point turn to the Assessment Book and complete activity 3.1 Managing records.

Unit 3.2

Electronic Management of Information

Introduction

Electronic transmission of information has created new opportunities for the recording, storage, and retrieval of information. In this unit we look at the practical applications of text and data files to the work of the clerk. Many of you may be familiar with these applications, so to help you assess your own learning needs we have provided a self-assessment activity for you to complete.

Self-assessment Activity

At this point turn to Module 3 Unit 2 'Self-assessment activity 3.2i' in the Assessment Book and complete the activity. You will note that it is organised into sections, which match to the following practical exercises 1-7.

- If you answer NO to any of the statements for Exercise 1, then begin with Exercise 1 below.
- When you have completed it return to the statements and check that you can answer YES to all Exercise 1 statements before moving on to Exercise 2.
- If you answer YES to all the statements in Exercise 1 then move on to the statements for Exercise 2, and so on.
- You need complete only those exercises for which you answered NO to at least one self-assessment statement.

Turn to the Assessment Book and complete the self-assessment activity for Module 3 Unit 2i.

Introduction Exercises

The following exercises are written for computers with either the Microsoft operating system Windows 2000, or Windows XP.

Before the session, ensure that your computer is switched on and shows the desk top. Some computers require a password; if you are using a borrowed computer make sure:

- you know the current password;
- it has Microsoft Office Professional 2000 software or Microsoft XP;
- it has a floppy disk drive (Drive A);
- it has an independent mouse attached (laptops);
- the mouse has both a left and a right mouse button.


As there are differences in the instructions for Windows 2000 and Windows XP Exercises 1-7 are provided in two versions, namely 2000 and XP.

Exercise 1 2000 Introducing Working with Computers

1. The screen you are looking at is called the DESK TOP. The icons on the desktop show you what is in your 'desk'.
2. Find the icon labelled MY COMPUTER. Move the mouse so the pointer is over the My Computer icon. Double click with the left mouse button.
3. A new screen will appear with icons for the different DRIVES in your computer.

To open a file on floppy disk

4. The first drive is labelled 'A'. This is for diskettes, often called 'floppy disks'.
 - (a) Most computers do not have a 'B' drive.
 - (b) The 'C' drive is known as the hard disk and it is where the computer operating system and all the software is stored.
 - (c) The computer may have other lettered drives for CD ROM or DVD. These do not concern us here.
5. If you have not already done so put floppy disk 1 into the 'A' drive. After a few seconds the title **IT Files** will appear under the 'A' drive icon.

6. Move the pointer to over the 'A' drive icon and left double click, a new screen will appear with a list of FILES. Left double click the file labelled AGENDA Template. The file will open and should fill the whole of your screen. *(If it does not. Use the mouse to move the pointer to the top right-hand corner of the screen where there are four small icons.  The furthest right is a cross, next to the cross are two little squares with black tops. Place the pointer over the two little squares and left click once. The file should now fill the screen.)*
7. The Agenda is:
 - (a) for Winsom School,
 - (b) the date of the meeting is not given,
 - (c) there are reports from four governors,
 - (d) there are no items under the heading Decision/Discussion.

To amend the template

1. Use your mouse to move the pointer to the end of the **School** name, click with the left mouse button once, a black vertical bar should flash (the cursor) at the end of **School**. Press down the left mouse button and hold it down while you drag the mouse across Winsom School. It should now be highlighted in black. Release the left mouse button. This is called **highlighting** the text.
 - (a) Key in the name of the new school **Losesom School**.
 - (b) Place the pointer at the end of **Meeting to be held on** click once with left mouse button so the cursor flashes after **on**.
 - (c) Key in space 29th November (followed by the current year).
 - (d) Using the mouse and left mouse button identify Item **7 b Numeracy**, press the space bar and the word Numeracy will disappear, press the back space key and the letter b disappears, press the back space key twice more and the text will have moved up and Special Educational Needs will be item 7b.
 - (e) Place the cursor after Item 8 and Key in 'Equal Opportunities Policy'. Repeat for Items 9 and 10 keying in agenda items of your own.

To SAVE Losesom School Agenda

2. Place your pointer over the drop down menu labelled FILE in the top left hand corner of the screen. Left mouse click. Move the pointer down to SAVE AS and left click. A new screen will open up showing the files on your diskette. In the **File Name** box key in **Losesom** and in the **File Type** box use the arrow to select Word Document. Place the pointer over **SAVE** and left click.




Learning Outcomes

Now you have completed Exercise 1 you will be able to:

- open a file on floppy disk;
- amend the text in a document;
- save a document on to a floppy disk.

Exercise 1 XP

Introducing Working with Computers

1. The screen you are looking at is called the DESK TOP. The icons on the desktop show you what is in your 'desk'.
2. Find the START button at the bottom left-hand corner of the screen. Move the mouse so the pointer is over the START button. Click with the left mouse button.
3. Find the icon labelled MY COMPUTER double left click.
4. A new small screen will appear with two columns of icons for the different DRIVES. On the right-hand side are listed:
 - (a) Files stored on this computer
 - (b) Hard disk drives
 - (c) Devices with removable storage
 - (d) Scanners and cameras.
5. The drive with removable storage is labelled 'A' this is for diskettes, often called 'floppy disks'.
 - (e) Most computers do not have a 'B' drive.
 - (f) The 'C' drive is known as the hard disk and it is where the computer operating system and all the software is stored.
 - (g) The computer may have other lettered drives for CD ROM or DVD. These do not concern us here.
6. If you have not already done so put floppy disk 1 into the 'A' drive. Left double click on 'A' drive icon. After a few seconds the title **IT Files** will appear under the 'A' drive icon.
7. Move the pointer to over the 'A' drive icon and left double click, a new screen will appear with a list of FILES. Left double click the file labelled AGENDA Template. The file will open and should fill the whole of your screen. *(If it does not. Use the mouse to move the pointer to the top right-hand corner of the screen where there are four small icons.    The furthest right is a cross, next to the cross are two little squares with black tops. Place the pointer over the two little squares and left click once. The file should now fill the screen.)*
8. The Agenda is:
 - (a) for Winsom School,
 - (b) the date of the meeting is not given,
 - (c) there are reports from four governors,
 - (d) there are no items under the heading Decision/Discussion.

To amend the template

1. Use your mouse to move the pointer to the end of the **School** name, click with the left mouse button once, a black vertical bar should flash (the cursor) at the end of **School**. Press down the left mouse button and hold it down while you drag the mouse across Winsom School. It should now be highlighted in black. Release the left mouse button. This is called **highlighting** the text.
 - (a) Key in the name of the new school **Losesom School**.
 - (b) Place the **pointer** at the end of **Meeting to be held on** click once with left mouse button so the cursor flashes after on.
 - (c) Key in space 29th **November** (followed by the current year).
 - (d) Using the mouse and **left** mouse button identify Item **7 b Numeracy**, press the space bar and the word Numeracy will disappear, press the back space key and the letter b disappears, press the back space key twice more and the text will have moved up and Special Educational Needs will be item 7b.
 - (e) Place the cursor after Item 8 and Key in 'Equal Opportunities Policy'. Repeat for Items 9 and 10 keying in agenda items of your own.

To SAVE Losesom School Agenda

2. Place your pointer over the drop down menu labelled FILE in the top left hand corner of the screen. Left mouse click. Move the pointer down to SAVE AS and left click. A new screen will open up showing the files on your diskette. In the **File Name** box key in **Losesom** and in the **File Type** box use the arrow to select Word Document. Place the pointer over **SAVE** and left click.

Learning Outcomes

Now you have completed Exercise 1 you will be able to:

- open a file on floppy disk;
- amend the text in a document;
- save a document on to a floppy disk.

Exercise 2 2000

Setting up a Word File

1. Access Drive A (refer to Exercise 1 for help).
- To create a new document**
 2. Use the Drop Down Menu FILE, run the pointer down to NEW, and another menu of software will appear. Run the pointer down to Microsoft Word and left click. A new icon will appear labelled NEW MICROSOFT WORD DOCUMENT. Left double click this icon. A blank page will appear.
- To extend a drop down menu**
 3. Go to FILE MENU Drop Down menu. At the bottom of the Menu is a double arrow. Left-click to extend the menu.
- To set up your page**
 4. Use FILE MENU and select PAGE SETUP. In Page Setup there are four sections MARGINS, PAPER SIZE, PAPER SOURCE, and LAYOUT. Select Paper Size and check that the Paper Size is A4, if it is not use the little arrow ▼ to view the paper sizes and select A4. Left-click OK.
 5. Use the VIEW Drop Down menu and check that PRINT LAYOUT is highlighted. You may need to extend the menu as described in 4. (In print layout you see the page, as it will appear when printed.) Also make sure the RULER is highlighted.
- To select your Tools**
 6. Use the TOOLS MENU and select LANGUAGE. Click SET LANGUAGE and make sure English UK is selected. Make sure the box 'Do not check spelling and grammar' is not selected. Any spelling errors will appear underlined in red and spacing or grammar errors in green (you can then consider them - the computer is not always right).
 7. Use the TOOLS MENU and select CUSTOMIZE. A new screen will appear with a list of tools. Check STANDARD, FORMATTING, and MENU BAR. Remove the checks from all the other tools. Left click **close**.

You are now ready to key in your Minutes of the meeting of Losesom School. This may take sometime so I have keyed in some minutes for you, but they are in a format that does not effectively aid the governor to quickly access and understand the content. Your task is to present them in a format which makes them more accessible to the reader.

Learning Outcomes

Now you have completed Exercise 2 you will be able to:

- create a new document;
- extend a drop down menu;
- set up your page;
- select your tools.

Exercise 2 XP

Setting up a Word File

1. Access Drive A (refer to Exercise 1 for help).
- To create a new document**
2. Use the Drop Down Menu FILE, run the pointer down to NEW, and another menu of software will appear. Run the pointer down to Microsoft Word and left click. A new icon will appear labelled NEW MICROSOFT WORD DOCUMENT. Left double click this icon. A blank page will appear.
- To extend a drop down menu**
3. Go to FILE MENU Drop Down menu. At the bottom of the Menu is a double arrow. Left-click to extend the menu.
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7. Use the TOOLS MENU and select CUSTOMIZE. A new screen will appear with three tabs along the top: Toolbars, Commands, Options. Left click on Toolbars and check STANDARD, FORMATTING, and MENU BAR. Remove the checks from all the other tools. Left click **close**.

You are now ready to key in your Minutes of the meeting of Losesom School. This may take sometime so I have keyed in some minutes for you, but they are in a format that does not effectively aid the governor to quickly access and understand the content. Your task is to present them in a format which makes them more accessible to the reader.

Learning Outcomes

Now you have completed Exercise 2 you will be able to:

- create a new document;
- extend a drop down menu;
- set up your page;
- select your tools.

Exercise 3 2000

Writing Minutes

If you have not completed Worksheet 2, before starting this Worksheet set up a New Word Document and minimise it for later use.

1. Open the file 'Losesom Minute File' from Diskette **IT Files**. This is not a complete set of Minutes, but sufficient for you to develop your skills.
2. Below the Drop Down Menus is a row of icons relating to TOOLS. Run the pointer across the row pausing on each one until a label appears giving the name of the tool. You may wish to do this several times to familiarise yourself with them.

To centre items

3. Identify the title, and then centre by placing the pointer over the centre icon at the top of the screen and left clicking.
4. Repeat for the date of the meeting. Identify the year 20010 and change to the current year.
5. Place the cursor before "Apologies... and holding the left mouse button down drag the mouse to the end of the sentence ...heavy rain." And release the mouse button. You have identified all the items in the Procedural section of the Minutes.

To insert numbers

6. Left click the Numbering Tool. Numbers 1 to 8 will appear.
7. With the text identified left click the FORMAT Drop down menu and left click BULLETS and NUMBERING.

To change the style of numbers

8. Select the OUTLINE NUMBERED Tab and select an appropriate style. (*Advanced: If none of the styles appear appropriate choose the one nearest to what you want and left click CUSTOMIZE button and change the settings.*) Left-click OK.
9. Although, there are 8 numbers identified they referred to only 3 items on the Agenda - Apologies - Minutes - Matters Arising.

To insert second level numbers or letters

10. Move the cursor to Item 2. Place the cursor before "The governing body..." and press the Tab key on the Keyboard once. Either a letter a) or a number will appear the other items will renumber.
11. Repeat this process for "Mrs Peech...", and "The proposer...".
12. Repeat the process for "Mrs Connolly..." and "Mr Stanton..."

**Continuing a
number sequence
after a heading**

13. Place the Cursor before “Headteacher’s Report” and key in the number 4 followed by two spaces in the same style as used for 1 to 3. The computer now knows that you want to continue the number sequence. Place the cursor after the word Report and press ENTER.
14. The headteacher is reporting on a series of activities. These can be expressed as bullet points.

**Separating out text
into bullet points**

15. Place the cursor before “Additional...” and press ENTER.
16. Repeat for the beginning of the three remaining sentences. You now have a list of sentences.
17. Identify all four sentences and left click on the BULLET tool. If the bullets appear to be inappropriate use the FORMAT Drop Down Menu, select BULLETS and NUMBERING. Choose the bullet Tab and select a different style. *(As with Outline Numbering Advanced users can click CUSTOMIZE to change the settings.)*

**Red and green
underlining**

18. Words underlined in red are either mistakes, or not in the Computer’s English (UK) Dictionary. By placing the cursor over the word and right clicking you can check the spelling. It is important to make sure you are using the UK dictionary.
19. Words underlined in green do not conform to the computer’s grammar proofing tool. By clicking the right mouse button over the words or phrase you can see a suggested alternative. It is good for use of punctuation, and the order of clauses in a sentence, but there are problems with collective nouns such as ‘staff’. It is the **user** who decides whether to accept or reject the alternative.

Adding style

20. Identify the title and go to the FONT size, change to **16** and left click the BOLD Tool. Add the words “Governing Body” to the title. Press ENTER before “Governing” so that both words are on the second line.
21. Identify the next line and change to font size 14.
22. Identify the remaining text and change the font size 12.
23. Identify Procedural and change to BOLD. Repeat for Monitoring.
24. If the default font is set to Times New Roman and you would prefer Arial. Identify the whole document use EDIT Drop Down Menu, left click SELECT ALL, and use the small arrow at the left side of the FONT tool to select the Arial font.
25. With the whole page identified use the EDIT Drop Down Menu, left click COPY.

26. At the very bottom of your screen are a set of boxes one of which will have a Blue W and New... Left click this box. The blank document you opened earlier will appear with a flashing cursor at the top left.
27. Use the EDIT Drop Down Menu, left click PASTE. Your Minutes should appear in the New file.
28. Use the FILE Drop Down Menu, left click SAVE AS. A new screen appears. Make sure:
 - (a) the Save In box reads "3 ½ Floppy A".
 - (b) the Save as type box reads "Word Document".
 - (c) key in the File Name "Losesom GB 29 Nov".
 - (d) **SAVE**.

Learning Outcomes

Now you have completed Exercise 3 you will be able to:

- use bullet points;
- use a multi-level numbering system;
- change the font, the font point size and add bold to make a document more accessible;
- copy a page of text from one document to another.

Exercise 3 XP

Writing Minutes

If you have not completed Worksheet 2, before starting this Worksheet set up a New Word Document and minimise it for later use.

1. Open the file 'Losesom Minute File' from Diskette IT Files. This is not a complete set of Minutes, but sufficient for you to develop your skills.
2. Below the Drop Down Menus is a row of icons relating to TOOLS. Run the pointer across the row pausing on each one until a label appears giving the name of the tool. You may wish to do this several times to familiarise yourself with them.

To centre items

3. Identify the title, and then centre by placing the pointer over the centre icon at the top of the screen and left clicking.
4. Repeat for the date of the meeting. Identify the year 20010 and change to the current year.
5. Place the cursor before "Apologies..." and holding the left mouse button down drag the mouse to the end of the sentence "...heavy rain." And release the mouse button. You have identified all the items in the Procedural section of the Minutes.
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To insert numbers

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To change the style of numbers

8. Select the OUTLINE NUMBERED Tab and select an appropriate style. (*Advanced: If none of the styles appear appropriate choose the one nearest to what you want and left click CUSTOMIZE button and change the settings.*) Left-click OK.
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Separating out text into bullet points

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Adding style

20. Identify the title and go to the FONT size, change to **16** and left click the BOLD Tool. Add the words “Governing Body” to the title. Press ENTER before “Governing” so that both words are on the second line.
21. Identify the next line and change to font size 14.
22. Identify the remaining text and change the font size 12.
23. Identify Procedural and change to BOLD. Repeat for Monitoring.
24. If the default font is set to Times New Roman and you would prefer Arial. Identify the whole document use EDIT Drop Down Menu, left click SELECT ALL, and use the small arrow at the left side of the FONT tool to select the Arial font.
25. With the whole page identified use the EDIT Drop Down Menu, left click COPY.

26. At the very bottom of your screen are a set of boxes one of which will have a Blue W and New... Left click this box. The blank document you opened earlier will appear with a flashing cursor at the top left.
27. Use the EDIT Drop Down Menu, left click PASTE. Your Minutes should appear in the New file.
28. Use the FILE Drop Down Menu, left click SAVE AS. A new screen appears. Make sure:
 - (a) the Save In box reads "3 ½ Floppy A".
 - (b) the Save as type box reads "Word Document".
 - (c) key in the File Name "Losesom GB 29 Nov".
 - (d) **SAVE**.

**Learning
Outcomes**

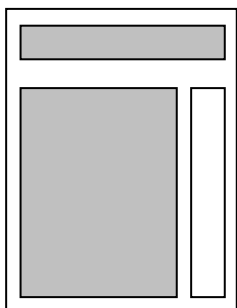
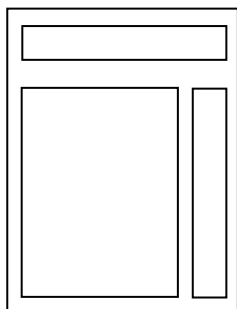
Now you have completed Exercise 3 you will be able to:

- use bullet points;
- use a multi-level numbering system;
- change the font, the font point size and add bold to make a document more accessible;
- copy a page of text from one document to another.

Exercise 4 2000

Text Boxes and Tables

Selecting Text Box Tools



One way of laying out Minutes which governors find helpful is to include an Action Column on the right-hand side of the page. There are two ways of doing this:

- using text boxes
 - inserting a table
1. From the TOOLS MENU select CUSTOMIZE and check the DRAWING box. The drawing tools will appear. Left click **close**.
 2. Run your pointer across the drawing tool icons to familiarise yourself with their functions. Note the Text Box icon with A and horizontal lines.
 3. Open a New Word Document and minimise.
 4. Open the file 'Losesom GB 29 Nov'.
 5. Left Click New Word Document. Click the Text Box icon and then move the pointer to the top of blank page and draw a box about 5cms tall by 15cms wide, by holding down the left mouse button and dragging the + across the page.
 6. The Text Box has little squares at the corners and half-way down each side. If it is not quite the right size you can increase or reduce its size by left clicking and dragging any of the little squares.

To draw a text box

7. Draw a second Text Box underneath the first about 20cms tall and 12cms wide. The left edges of the two boxes should be roughly in-line.
8. Draw a third Text Box underneath the first one and to the right of the second Text Box. This should be 20cms tall and about 3cms wide. Your page will resemble the diagram.

To line-up the edges of text boxes

9. To line them up quickly and accurately. Click on the top box and hold down the shift-key, now click on the lower box. Both boxes are now identified.
10. Go to the DRAW icon and click the arrow to the left. Run the pointer down to Align and Distribute and pause a new menu will appear. Take your pointer across to the top of the bar at the top of the menu and left-click and hold. Drag this new menu across the screen and place next to the Draw Tools icon. Run your pointer across the new menu to find out what the symbols mean.
11. With the top and right boxes identified left-click Align Left icon.
12. Identify the top and right box and left click Align Right.

To insert text into text boxes

13. Left-click 'Losesom GB 29 Nov' to Maximise.
14. Identify and COPY the two-centred lines.
15. Return to the New Document and PASTE into the top box.
16. Identify and COPY the remaining text and PASTE into the left-hand box.
17. Place the cursor over the right hand box and left click. Key in 'Action' and Centre. The right-hand box is the Action column.
18. Use the ENTER key to position the cursor next to Item 2 a). Key in your own name.

To remove the text box black line borders

19. Identify the Text Box, place the cursor over the LINE COLOUR Drawing icon. Left-click the arrow and click on No Line. The black borders will disappear.
20. Repeat 19 for the other two Text Boxes.
21. Save as "Losesom GB 29 Nov Action 1"

Selecting Table Tools

1. From the TOOLS MENU select CUSTOMIZE and uncheck the DRAWING box. Check the TABLES and BORDERS box. The Drawing tools will disappear and Table tools appear.
2. Run your pointer across the table tool icons to familiarise yourself with their functions. Note the Insert Table icon.
3. Open a New Word Document and minimise.
4. Open the file 'Losesom GB 29 Nov'.
5. Identify the top two lines of text and COPY.
6. PASTE into the New Word Document.

To Insert a Table

7. Press the ENTER key 4 times to move the cursor down the page.
8. Place the cursor over the INSERT TABLE tool and left-click. Select 2 columns and 3 rows.
9. To narrow the right-hand column, place the pointer over the centre vertical line, when you are directly over it the pointer changes to a double vertical line, left-click and drag to the right until the column is about 3cms wide.
10. Point and click in the right-hand column top row. Key in 'Action' and Centre in the column.
11. Maximise Losesom GB 29 Nov. Identify, COPY and PASTE the Procedural section into the left-hand column second row of the table.
12. Identify, COPY and PASTE the Monitoring section into the left-hand column third row of the table.

13. The last item in each section may have lost its numbering. To restore - place the cursor before the first letter of the item and backspace until it is on the same line as the previous item. Press ENTER and the numbering or bullet point should be restored.

To remove the Table black line borders

14. Use TABLE Drop Down Menu, run the pointer down to Select and left-click on Table. Click the right mouse button and a Menu appears. Select Borders and Shading and left-click.
15. Under Border Setting left-click the None box. The borders will be replaced by grey lines. When the pages are printed the grey lines will not print.
16. Save the file as "Losesom GB 29 Nov Action 2".

You will need to practice creating Text Boxes and Tables. Explore the TABLES Tool Menu to see how you can Merge Cells, Split Cells, Insert and delete rows and columns.

Learning Outcomes

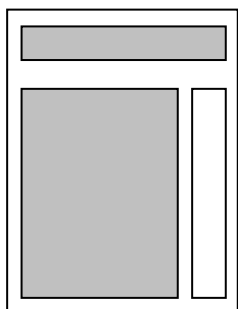
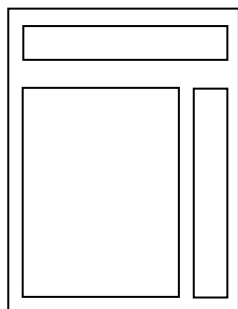
Now you have completed Exercise 4 you will be able to:

- use a Text Box;
- insert a Table.

Exercise 4XP

Text Boxes and Tables

Selecting Text Box Tools



One way of laying out Minutes which governors find helpful is to include an Action Column on the right-hand side of the page. There are two ways of doing this:

- using text boxes
 - inserting a table
1. From the TOOLS MENU select CUSTOMIZE and check the DRAWING and DRAWING CANVAS boxes. The drawing tools will appear. Left click close.
 2. Run your pointer across the drawing tool icons to familiarise yourself with their functions. Note the Text Box icon with A and horizontal lines.
 3. Go to File drop down menu, left click NEW and select BLANK DOCUMENT. Left double click to open a New Word Document. Minimise the new document.
 4. Open the file 'Losesom GB 29 Nov'.
 5. Along bottom of screen select blue tab and left click New Word Document to maximise it. Click the Text Box icon, a box will appear labelled DRAWING CANVAS – ignore. Move the pointer to the top of the page and draw a box about 5cms tall by 15cms wide, by holding down the left mouse button and dragging the + across the page.
 6. The Text Box has little circles at the corners and half-way down each side. If it is not quite the right size, you can increase or reduce its size by left clicking and dragging any of the little circles.

To draw a text box

7. Draw a second Text Box underneath the first about 20cms tall and 12cms wide. The left edges of the two boxes should be roughly in-line.
8. Draw a third Text Box underneath the first one and to the right of the second Text Box. This should be 20cms tall and about 3cms wide. Your page will resemble the diagram.

To line-up the edges of text boxes

9. To line them up quickly and accurately. Click on the top box and hold down the shift-key, now click on the lower box. Both boxes are now identified.
10. Go to the DRAW icon (bottom left-hand corner) and right click the arrow to the left. Run the pointer down to Align and Distribute and pause a new menu will appear. Take your pointer across to the top of the bar at the top of the menu and left-click and hold. Drag this

new menu across the screen and place next to the Draw Tools icon. Run your pointer across the new menu to find out what the symbols mean.

11. With the top and right boxes identified left-click Align Left icon.

12. Identify the top and right box and left click Align Right.

To insert text into text boxes

13. Left-click 'Losesom GB 29 Nov' to Maximise.

14. Identify and COPY the two-centred lines.

15. Return to the New Document and PASTE into the top box.

16. Identify and COPY the remaining text and PASTE into the left-hand box.

17. Place the cursor over the right hand box and left click. Key in 'Action' and Centre. The right-hand box is the Action column.

18. Use the ENTER key to position the cursor next to Item 2 a). Key in your own name.

To remove the text box black line borders

19. Identify the Text Box, place the cursor over the LINE COLOUR Drawing icon. Left-click the arrow and click on No Line. The black borders will disappear.

20. Repeat 19 for the other two Text Boxes.

21. Save as "Losesom GB 29 Nov Action 1"

Selecting Table Tools

1. From the TOOLS MENU select CUSTOMIZE and uncheck the DRAWING box. Check the TABLES and BORDERS box. The Drawing tools will disappear and Table tools appear.

2. Run your pointer across the table tool icons to familiarise yourself with their functions. Note the Insert Table icon.

3. Open a New Word Document and minimise.

4. Open the file 'Losesom GB 29 Nov'.

5. Identify the top two lines of text and COPY.

6. PASTE into the New Word Document.

To Insert a Table

7. Press the ENTER key 4 times to move the cursor down the page.

8. Place the cursor over the INSERT TABLE tool and left-click. Select 2 columns, 3 rows and Auto-fit to Window.

9. To narrow the right-hand column, place the pointer over the centre vertical line, when you are directly over it the pointer changes to a double vertical line, left-click and drag to the right until the column is about 3cms wide.

10. Point and click in the right-hand column top row. Key in 'Action' and Centre in the column.
11. Maximise Losesom GB 29 Nov. Identify, COPY and PASTE the Procedural section into the left-hand column second row of the table.
12. Identify, COPY and PASTE the Monitoring section into the left-hand column third row of the table.
13. If the last item in each section has lost its numbering. To restore - place the cursor before the first letter of the item and backspace until it is on the same line as the previous item. Press ENTER and the numbering or bullet point should be restored.

**To remove the
Table black line
borders**

14. Use TABLE Drop Down Menu, run the pointer down to Select and left-click on Table. Click the right mouse button and a Menu appears. Select Borders and Shading and left-click.
15. Under Border Setting left-click the None box. The borders will be replaced by grey lines. When the pages are printed the grey lines will not print.
16. Save the file as "Losesom GB 29 Nov Action 2".

You will need to practice creating Text Boxes and Tables. Explore the TABLES Tool Menu to see how you can Merge Cells, Split Cells, Insert and delete rows and columns.

**Learning
Outcomes**

Now you have completed Exercise 4 you will be able to:

- use a Text Box;
- insert a Table.

Exercise 5 2000

Inserting Graphics (1)

There are times when the clerk may be asked to insert a graphic or a picture into a document eg the school logo. Photographs can be introduced from a scanner or from a digital camera.

To insert a Graphic

1. The graphic you are going to insert is on diskette **IT Files**. Insert the diskette into the A Drive and double click the A Drive icon to see the list of files on the diskette. There are 5 files all labelled Winsom logo. They all contain the same graphic in a different format.
2. Place your pointer over each graphic in turn and pause, a statement will appear giving you the file type and size. Note the difference in size between the Windows Bitmap and the PNG Portable Network Graphic file.
3. Double left-click the Winsom logo PNG Image. It will open in Microsoft Editor which is software provided as part of Microsoft Office. *If Microsoft Editor software is not loaded on your computer and the PNG Image will not open try opening the Windows bitmap image instead and use the Windows bitmap image instead, for the following activities.*
4. Go to the EDIT Drop Down menu and select COPY.
5. Minimise Microsoft Photo Editor.
6. Open a New Word document. Go to EDIT Drop Down menu and select PASTE SPECIAL. A series of options will appear.
7. Click each of the options in turn and read the information in the Result box.
8. Select PICTURE and OK. The Winsom School Logo will appear at the top of the page with the cursor flashing beneath already for you to write a letter, agenda or minutes.

To save as a Document TEMPLATE

9. Go to SAVE AS. Browse the Save in box and select 3 ½ Floppy (A). In the File Name box key in **Winsom Headed Notepaper**. In the File Type box browse and select Document Template. Left-click Save.

Whenever you open a Document Template file a new document will be created with the label Document 1 when you have finished working on the file, you will then Save with a new name eg Winsom Agenda 17 January.

Learning Outcomes

Now you have completed Exercise 5 you will be able to:

- insert a graphic into a Word Document.
- create a Document Template.
- know the different graphic formats.

Exercise 5XP

Inserting Graphics (1)

There are times when the clerk may be asked to insert a graphic or a picture into a document e.g. the school logo. Photographs can be introduced from a scanner or from a digital camera.

- To insert a Graphic**
1. The graphic you are going to insert is on diskette **IT Files**. Insert the diskette into the A Drive and double click the A Drive icon to see the list of files on the diskette. There are 5 files all labelled Winsom logo. They all contain the same graphic in a different format.
 2. Place your pointer over each graphic in turn and pause, a statement will appear giving you the file type and size. Note the difference in size between the Windows Bitmap and the PNG Portable Network Graphic file.
 3. Double left-click the Winsom logo PNG Image. It will open in Microsoft Editor which is software provided as part of Microsoft Office. *If Microsoft Editor software is not loaded on your computer and the PNG Image will not open try opening the Windows bitmap image instead and use the Windows bitmap image instead, for the following activities.*
 4. Go to the EDIT Drop Down menu and select COPY.
 5. Minimise Microsoft Photo Editor.
 6. Open a New Word document. Go to EDIT Drop Down menu and select PASTE SPECIAL. Options will appear.
 7. For each option read the information in the Result box to familiarise yourself with each one.
 8. Select FILES and OK. The Winsom School Logo will appear at the top of the page with the cursor flashing beneath already for you to write a letter, agenda or minutes.
- To save as a Document TEMPLATE**
9. Go to SAVE AS. Browse the Save in box and select 3 ½ Floppy (A). In the File Name box key in **Winsom Headed Notepaper**. In the File Type box browse and select Document Template. Left-click Save.

Whenever you open a Document Template file a new document will be created with the label Document 1 when you have finished working on the file, you will then Save with a new name eg Winsom Agenda 17 January.

Learning Outcomes

Now you have completed Exercise 5 you will be able to:

- insert a graphic into a Word Document.
- create a Document Template.
- know the different graphic formats.

Exercise 6 2000

Inserting Graphics (2)

To complete this Exercise you will need a Scanner attached to your computer and a photograph or picture.

To Insert a Photograph or Picture from a Scanner

1. Place the picture/photo you are going to insert under the lid of the scanner at the top right corner.
2. Place diskette **IT Files** in Drive A and open. Open a New Word Document. Go to TOOLS Drop Down Menu and left-click CUSTOMIZE. On the toolbar tab make sure DRAWING is checked. Left-click CLOSE.
3. Left-click the Text Box icon and on the page left click and draw a Text Box about the same size and shape as your picture. Make sure the cursor is flashing inside the Text Box.
4. Go to INSERT Drop Down Menu. Run the pointer down to PICTURE and across to FROM SCANNER OR CAMERA left-click. A menu will appear showing the hardware being used. If there is a choice of Print or Web quality, select Print Quality. Left-click INSERT. (**NB** *This menu will vary from scanner to scanner*). The photo or picture will now appear on the page. The photo/picture will appear inside the Text Box.
5. To move the picture/photo around the page place the cursor over the edge of the Text Box and left-click, it should change to a band of dots. By left clicking and holding down you can move the picture around the page (four directional arrows will appear).
6. To change the size of the picture place the pointer over the centre of the picture and left click, a black line will appear round the edge of the picture with black squares at the corners and side centres. By putting the pointer over any of the black squares, left-clicking, and dragging the picture can be made smaller or larger.

Learning Outcomes

Now you have completed Exercise 5 you will be able to:

- scan a picture or photograph into a Word Document;
- change the size of the image;
- move the image to a different position on the page.

Exercise 6 XP

Inserting Graphics (2)

To complete this Exercise you will need a Scanner attached to your computer and a photograph or picture.

To Insert a Photograph or Picture from a Scanner

1. Place the picture/photo you are going to insert under the lid of the scanner at the top right corner.
2. Place diskette **IT Files** in Drive A and open. Open a New Word Document. Go to TOOLS Drop Down Menu and left-click CUSTOMIZE. On the toolbar tab make sure DRAWING is checked. Left-click CLOSE.
3. Left-click the Text Box icon and on the page left click and draw a Text Box about the same size and shape as your picture. Make sure the cursor is flashing inside the Text Box.
4. Go to INSERT Drop Down Menu. Run the pointer down to PICTURE and across to FROM SCANNER OR CAMERA left-click. A menu will appear showing the hardware being used. If there is a choice of Print or Web quality, select Print Quality. Left-click INSERT. (**NB** *This menu will vary from scanner to scanner*). The photo or picture will now appear on the page. The photo/picture will appear inside the Text Box.
5. To move the picture/photo around the page place the cursor over the edge of the Text Box and left-click, it should change to a band of dots. By left clicking and holding down you can move the picture around the page (four directional arrows will appear).
6. To change the size of the picture place the pointer over the centre of the picture and left click, a black line will appear round the edge of the picture with black squares at the corners and side centres. By putting the pointer over any of the black squares, left-clicking, and dragging the picture can be made smaller or larger.

Learning Outcomes

Now you have completed Exercise 5 you will be able to:

- scan a picture or photograph into a Word Document;
- change the size of the image;
- move the image to a different position on the page.

Exercise 7 2000

Mail Merge Documents

Considerable time can be saved when sending out agenda papers if a Mail Merge file is used. To use mail merge two files are created: a document eg a letter and a database eg a set of names and addresses. The two files are then merged and the result is a set of individually addressed letters.

Place diskette **IT Files** in Drive A and open. Open a New Word Document.

To Create a Mail Merge document

1. Go to TOOLS Drop Down menu and select MERGE DOCUMENTS. A new menu will appear with a list of files on the Diskette in Drive A. *If it shows the files in My Documents or another folder, use the arrow to browse and select 3 ½ Floppy (A).*
2. Select the file **Winsom Headed Notepaper** and left-double click to open.
3. Place the pointer about 5cms below the heading and left-click. If the cursor appears higher up the page, use the Return key to move it down.
4. Key in:
Dear

Please find enclosed the Agenda and Papers for the next meeting of the Governing Body on 17th January.

Yours sincerely,

Matt Clerk
5. Save on the diskette as a Word Document labelled Winsom School GB Letter 17 January.
6. Go to TOOLS Drop Down menu and select MAIL MERGE. A new Menu will appear with 3 stages.
7. **Stage 1** Left-click CREATE. Left-click the option Form Letter and then ACTIVE WINDOW.
8. **Stage 2** Left-click GET DATA. Left-click CREATE DATA SOURCE. Read the description of the data source. From the list of fields REMOVE Job Title, by left-clicking and then left-click REMOVE FIELD NAME. Repeat for Company, State, and Country. Click OK. A Save As box will appear. Save in 3 ½ Floppy (A), File Name: Winsom GB Database. File type: Word Document.

9. A new menu will appear. Left-click Edit Data Source. A form will appear into which you can enter the names and addresses of the governors. Enter the following name and address: Mrs Suzie Burnside, 25 Coniston Street, Copper Beech, NOWHERE. Left-click ADD NAME. A new form will appear. Enter Mr Joseph Dalewood, Leaf House, Sycamore, NOWHERE.
10. Left-click ADD NAME. A new form will appear. Dr Clive Braeburn, 310 Apple Road, Oakwood, NOWHERE. . Left-click ADD NAME. A new form will appear. These will suffice for the activity. Left-click OK. You will be asked to EDIT MAIN MENU left-click.
11. The screen will switch to **Winsom School GB Letter 17 January**. Two new boxes will have appeared at the above the ruler labelled INSERT MERGE Field and INSERT WORD Field.

**To INSERT the
addresses of the
people in your
database**

12. Place the cursor about 2cms below the School heading and left-click. The cursor will flash.
13. Go to INSERT MERGE FIELD left-click, left click **Title**, space.
14. Go to INSERT MERGE FIELD left-click, left click **First Name**, space.
15. Go to INSERT MERGE FIELD left-click, left click **Last Name**. Press ENTER.
16. Go to INSERT MERGE FIELD left-click, left click **Address1**, space. Press ENTER.
17. Go to INSERT MERGE FIELD left-click, left click **Address2**, space. Press ENTER.
18. Go to INSERT MERGE FIELD left-click, left click **City**. Press ENTER.
19. Place the cursor after Dear, space, and then repeat steps 13 to 15 adding a comma after **Last Name**.
20. Above the ruler is a new icon with ◀ ▶ and ABC underneath. This is the VIEW MERGED DATA icon. Left-click to switch to text. To the right of the VIEW MERGED DATA icon are some arrows and a number box ◀ ◀ 1 ▶ ▶. Click the first double arrow to the right of the 1 to see the next address and again for the third address. Click the double arrow to the left to go backwards through the address list. The double arrows with a bar ◀ ▶ move to directly to the beginning or the end of the database.
21. To enter the date automatically place the cursor below the address, justify to the right by left-clicking Align Right icon. Go to INSERT Drop Down Menu and left-click DATE and TIME. Make sure the LANGUAGE is set to English (UK) and the UPDATE AUTOMATICALLY box is checked. Identify the date style, which you prefer and left-click OK.

To merge the letter and the database

22. **Stage 3.** Go to TOOLS, left-click MAIL MERGE and left-click MERGE. A new menu will appear. Make sure that:
- Merge to reads NEW DOCUMENT
 - Records to merge – ALL is checked
 - When merging records – “Don’t print blank lines....” Is checked.

23. Left-click MERGE.

24. The file Form Letter 1 appears. It has three letters, each one addressed to a different person in the database. To PRINT go to FILE Drop Down Menu left-click PRINT and follow the printer instructions. Alternatively, left-click the PRINTER icon on the Tool bar above the ruler.

Learning Outcomes

Congratulations on completing Exercise 7. You will now be able to:

- create a letter;
- create a database with names and addresses;
- merge the letter and the databases to provide letters addressed to the people in the database.

In this unit you have used two types of electronic files:

- Text documents
- Databases.

Assessment

At this point turn to the Assessment Book and complete assessment 3.2ii which is a review of the learning in Exercises 1-7.

Exercise 7 XP

Mail Merge Documents

Considerable time can be saved when sending out agenda papers if a Mail Merge file is used. To use mail merge two files are created: a document eg a letter and a database eg a set of names and addresses. The two files are then merged and the result is a set of individually addressed letters.

Place diskette **IT Files** in Drive A and open. Open a New Word Document.

To Create a Mail Merge document

1. Open 'Winsom Headed Notepaper' on floppy diskette in Drive A.
2. Go to TOOLS Drop Down menu and select LETTERS AND MAILINGS. Select SHOW MAIL MERGE TOOLBAR. Check MAIL MERGE WIZARD.
3. A new menu will appear with a list of document types:
 - Letters
 - Email messages
 - Envelopes
 - Labels
 - Directory

Step 1 Check LETTERS. Left click Next. On the right-hand menu select MAIL MERGE WIZARD

Step 2 Check USE CURRENT DOCUMENT (i.e. Winsom Headed Notepaper) Left click Next

Step 3 Check SELECT RECIPIENTS Left click Next

Fill in form as follows:

To INSERT the addresses of the people in your database

- Mrs Suzie Burnside, 25 Coniston Street, Copper Beech, NOWHERE. Left-click NEW ENTRY A new form will appear.
- Mr Joseph Dalewood, Leaf House, Sycamore, NOWHERE. NEW ENTRY A new form will appear
- Dr Clive Braeburn, 310 Apple Road, Oakwood, NOWHERE. Left click CLOSE. Left-click OK. SAVE AS 'Winsom Governing Body Address List'

These will suffice for the activity.

Step 4 Write your letter

Place the pointer about 5cms below the heading and left-click. If the cursor appears higher up the page, use the Return key to move it down.

Key in:

Dear

Please find enclosed the Agenda and Papers for the next meeting of the Governing Body on 17th January.


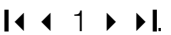

Yours sincerely,

Matt Clerk

Save on the diskette as a Word Document labelled Winsom School GB Letter 17 January.

Step 5 MAIL MERGE. Check ADDRESS BLOCK and GREETING LINE.

To merge the letter and the database

Above the ruler is a new icon with  and ABC underneath. This is the VIEW MERGED DATA icon. Left-click to switch to text. To the right of the VIEW MERGED DATA icon are some arrows and a number box . Click the first single arrow to the right of the 1 to see the next address and again for the third address. Click the single arrow to the left to go backwards through the address list. The single arrow with a bar  move to directly to the beginning or the end of the database.

To enter the date automatically place the cursor below the address, justify to the right by left-clicking Align Right icon. Go to INSERT Drop Down Menu and left-click DATE and TIME. Make sure the LANGUAGE is set to English (UK) and the UPDATE AUTOMATICALLY box is checked. Identify the date style, which you prefer and left-click OK.

Step 6 Complete merge. Edit individual letters.

CLOSE.

Learning Outcomes

Congratulations on completing Exercise 7. You will now be able to use the MAIL MERGE WIZARD to:

- create a letter;
- create a database with names and addresses;
- merge the letter and the databases to provide letters addressed to the people in the database.

In this unit you have used two types of electronic files:

- Text documents
- Databases.

Finally

The text documents are used for agendas, minutes and letters. Databases are appropriate for lists of names and addresses, records of attendance etc. Text documents and databases can be merged to personalise letters, print envelopes, and labels saving considerable time and ensuring accuracy. Every time a piece of information is transcribed there is an opportunity for error. With a database as long as the information is input correctly, the output will be correct.

Tables can be set up very quickly for presenting columns of data, action columns in minutes and statistical data such as end of key stage national assessment data.

At times pictures or graphics may need to be included in reports etc. Text boxes are useful devices for identifying the space into which to insert a picture or graphic and then moving it around the document. As with all skills these need to be practised or they may be forgotten.

Assessment

At this point turn to the Assessment Book and complete assessment 3.2ii which is a review of the learning in Exercises 1-7.

Unit 3.3

Electronic Communication

Introduction

Electronic communication is a fast and efficient method of communication with schools, local authorities and most church authorities now connected to the internet. However, many governors may not have access to electronic mail (email) facility, and if they do they may not wish to use it for the purposes of governance. Therefore, it is important that you establish with governors whether or not they wish you to use email to communicate with them and, if so, what communications are appropriate to send by email and which should be sent by surface mail. For example, arranging the date of an additional meeting with a mix of email and/or telephone may be more efficient and may enable more governors to attend than arranging the date with a sequence of telephone calls. However, currently it may be more acceptable to governors to despatch the agenda and papers for a meeting, however arranged, by post.

The World Wide Web, or internet is an excellent source of information, particularly DfES guidance and policy documents. In addition to DfES and local authority documentation, the governor organisations, ISCG, NASG and NGC all have websites with useful information. The Education Network (TEN) provides summaries and updates on current issues relevant to governors. In this Unit the focus is on the practical activities of communicating by email and consulting documents on the World Wide Web.

Self-assessment Activity

As in Unit 2 a self-assessment activity has been provided for you to assess your own learning needs. The statements in the self-assessment activity relate to the following Exercises 8-11. You need to begin by answering YES or NO to the statements for Exercise 8. As with the self-assessment activity in Unit 2, when you answer NO to a statement then you complete the matching exercise.

Turn to the Assessment Book and complete self-assessment activity 3.3i.

Exercise 8

Electronic Mail

This activity is based on the Microsoft 2000 Professional software.

**To open up
Microsoft Outlook
or Outlook Express**

Email provides a fast way of communicating with people, however, not all members of a governing body will have email, so the clerk will need to agree with the governing body, a policy and protocol for the use of email in supporting the work of the governing body.

1. On the desktop are a number of icons. The computer will be configured to access email via Microsoft Outlook or Outlook Express.
2. The icon for Outlook Express is an envelope with arrows round it. The Microsoft Outlook is a square with a letter inside and Microsoft Outlook underneath.
3. Left-click on Outlook Express if present, otherwise Microsoft Outlook. This will take you through to one of several pages in the Outlook Express Folder.
4. To explore Outlook Express look to the top left-hand corner of the screen where there is a list of folders. Try left clicking one each of these folders.
 - (a) Outlook Express has three main headings Email, Newsgroups and Contacts. At the bottom right there is a box, which gives you the option of going straight to the Inbox when Outlook Express starts. Tick this box.
 - (b) Local Folders gives you details of the folders and the number of messages in each.
 - (c) Inbox is the folder in which your all your messages will appear.
 - (d) Outbox is the folder in which messages waiting to be sent are 'parked' like a post box. The difference being that you can retrieve messages from the OUTBOX.
 - (e) Sent Items is the folder listing all the messages sent.
 - (f) Deleted Items contains all those messages you have deleted from the Inbox, Outbox and Sent Items. They are not deleted until you empty this folder.
 - (g) Drafts are messages, which you have started work on, and you will send later.
 - (h) Other folders can be created to contain messages from a particular source. For example, if you clerk three governing bodies you can create a folder for each one.
5. Below the folders box there is a list of Contacts. This is the list of all the people in your address book. There is a slide bar to the left of the box. If the box is full use the scroll bar to the left by left-clicking on it and dragging downwards to view the names out of sight.

**Understanding
email formats**

6. Left-click Outbox in the folders list. Go to the NEW MAIL icon and left-click on the arrow. Select NO STATIONERY by left-clicking on the word. A form will appear.
7. Message Form has 4 rows at the top.
 - (a) To: is where you put the address
 - (b) Cc: is where you put the address of other people who you want to receive the message.
 - (c) Bcc: has a similar function. (You can remove the Bcc row by selecting All Headers from the View Drop Down Menu.)
 - (d) Subject: is where you type a short title for your message.
 - (e) The large box below Subject is the space for your message. It will expand as you type.

Email addresses consist of

- a user name eg dummy
- an @ sign
- an internet provider eg courseprovider.co.uk

The full address is dummy@courseprovider.co.uk.

Email addresses are often written in lower case. Notice the ending of the address. Email addresses have a number of different endings as follows:

.co.uk	UK company
.org.uk	UK organisation
.gov.uk	UK government
.net	network
.com	commercial

NB The last two are international. Any of the above endings can also be the endings for websites.

Fill in the four rows of the email address as follows:

- (a) dummy@courseprovider.co.uk
- (b) leave Cc and Bcc empty
- (c) Subject: Agenda 29th November
- (d) Write in the message box. Dear Mrs Goodhead, Can you please email your report for the meeting on 29th no later than 17th November. Many thanks. Matt Clerk.

To send an email

- (e) When you are satisfied with the layout left click SEND at the top left-hand side of the menu bar. The message should appear in the OUTBOX. At this point you have not sent the message, you have put it in the 'post box' where it is waiting to be collected.
- (f) Go to SEND AND RECEIVE on the menu bar and left-click the arrow. Left-click '**Send and receive**'. A **dial-up Connection** box will appear. If the user name and password are filled in left-click **Connect**. Your computer will dial through to the internet, when a connection has been established and your password verified then the message will be sent, and any messages held at the server will be received.
- (g) You know your message has gone when it disappears from the OUTBOX. Check the SENT BOX by left-clicking on the Sent Item Folder. The message should be listed there.
- (h) Go to the INBOX by left-clicking it in the Folder list to see if any new messages have arrived.
- (i) The computer may have automatically disconnected after it completed the Send and Receive operation. Check the computer has disconnected by going to FILE Drop Down menu. If you are off-line, **Work Off-line** should be checked. If it is not then left-click to check it.

Learning Outcomes

Now you have completed Exercise 8 you should be able to:

- know how an email address is constructed
- create a message
- send a message

Exercise 9

Email Attachments

Clerks may wish to send a proposed agenda or set of minutes to the chair and/or headteacher by email. Alternatively the chair/head may send their proposals to the clerk. In both cases the best way of doing this is to ATTACH the document to the email.

1. To send an email with an attachment. Fill in the four rows of the email address as follows:
 - (a) dummy@courseprovider.co.uk
 - (b) leave Cc and Bcc empty
 - (c) Subject: Agenda 29th November
 - (d) Write in the message box. Dear Mrs Goodhead, Please find attached the Agenda for the meeting to be held on 29th November.
2. Left click on the INSERT drop down menu at the top of your message.
3. Left-click FILE ATTACHMENT. An INSERT ATTACHMENT box will appear.
4. To find the file you want to attach left-click on the arrow to the right of the LOOK IN: box and select '3 ½ Floppy A' by left-clicking the mouse button.
5. All the files on the diskette will be listed. Left-click 'Winsom School Governing Body' and then left –click the ATTACH button.
6. The INSERT ATTACHMENT box disappears and your message has a new box below the Subject box labelled Attach.
 - (a) When you are satisfied with the message left click SEND at the top left-hand side of the menu bar. The message should appear in the OUTBOX with a paper clip in front. The paper clip denotes a message is attached.
 - (b) Go to SEND AND RECEIVE on the menu bar and left-click the arrow. Left-click **'Send and receive'.** A dial-up **Connection** box will appear. If the user name and password are filled in left-click **Connect**. Your computer will dial through to the internet, and send the message.
 - (c) You can attach several messages to an email. Repeat the process in a.

Learning Outcomes

Now you have completed Exercise 9 you should be able to:

- send an email with an attachment.

Exercise 10

Using the Address Book

The Address Book is a useful tool and can save time. It is a list of names and addresses you contact by email. As a clerk you may wish to send the same email to more than one person. The addresses in the book can be organised into groups. For example, all the governors with email addresses can be grouped together under the name Winsom GB and the chair and headteacher together as Winsom C&HT. Grouping addresses saves time because to send an email to everyone in the group you need only to select the Group.

To add to the address book

1. Select the **Inbox** folder and the drop down menu ADDRESSES by left-clicking. ADDRESS BOOK, the Main Identity box appears. Above the box are a series of buttons. Left-click NEW.
2. Left-click NEW CONTACT. A PROPERTIES Box appears. In the properties box enter the following:

(a) FIRST	Michelle
(b) LAST	Goodhead
(c) EMAIL	<u>michelle.goodhead@blackwoodhouse.co.uk</u>
(d) left-click	OK
3. Repeat for

(a) FIRST	Ronan
(b) LAST	Smith
(c) EMAIL	<u>ronan.smith@blackwoodhouse.co.uk</u>
(d) left-click	OK
4. To place these two addresses in a group. Repeat 1. Under NEW this time left-click NEW GROUP. A PROPERTIES box will open. In the Group Name box enter 'Winsom C&HT'. Left-click SELECT MEMBERS. The ADDRESS BOOK, Main Identity box will appear. In the Find box enter Michelle Goodhead the cursor will jump to Michelle's name and identify it in grey. Left-click SELECT. Repeat the process for Ronan Smith. When both names have appeared in the SELECT box. Left-click OK. You now have a Group set-up for the chair and headteacher of Winsom School.
5. To test the Group contact list open a new email and select Winsom School from the Address Book to enter in the TO box. Right-click Winsom School and select **properties**. The contacts to whom the email is being sent are listed. It should list Michelle Goodhead and Ronan Smith.

Learning Outcomes

Now you have completed Exercise 10 you should be able to:

- add names to the address book
- create a contact group

Exercise 11

Using the World Wide Web

Access to the latest information can be difficult, particularly for those clerks who do not work in an educational environment. The internet or World Wide Web can provide instant access to government and many LA documents.

To access the World Wide Web

- 1 Left-click on the Internet icon on the computer desktop.
 - (a) This will open the HOME PAGE provided by the Internet Service Provider (ISP). The Home Page contains information about a wide range of services provided by the ISP including access to a series of search engines, which you can use to search the web for information.

To find a web site when you know the address

- (b) The simplest way of accessing Government and Local Education Authority sites is to directly input their address in the ADDRESS box near the top of the HOME PAGE. Find the ADDRESS box which will contain the address of the HOME PAGE, for example, <http://www.msn.com/>. Use the pointer and left mouse button to identify the second part of the address that is everything after <http://www>. Replace with 'dfes.gov.uk', so that the address now reads <http://www.dfes.gov.uk>. Either press RETURN or left-click the GO button at the right-hand side of the ADDRESS box.
 - (c) If the computer is not connected to the internet, you will be asked whether or not you want to Connect. Left-click to **Connect** and follow the Dial up Connection instructions.
 - (d) The HOME PAGE of the DfES will appear with the latest government education news. Below the headline are a series of headings beginning with Adult Learners. Look along the line and select SCHOOL GOVERNORS by placing the pointer over the heading and left-clicking with the mouse button. The words will turn red and the SCHOOL GOVERNORS' CENTRE HOME PAGE will appear. Choose one of the topics and left-click to find out more.
- 2 On the SCHOOL GOVERNORS' CENTRE HOME PAGE find the **Search this site** box and type in the word 'clerk' and left-click GO. All the documents with references to clerks will appear.
- 3 Find the National Job Description and Person Specification. Left-click to open. Go to the FILE Menu to **Print**. Go to the FILE Menu to **Save as**. Use the browser to select '3 ½ Floppy A' and save the file to your diskette.

- 4 In the list of topics click 'Downloads'. From this page you can download the software necessary for your computer to read the DfES documents. Most computers will have a browser, but you may need to download Adobe Acrobat Reader.
- 5 To download Adobe Acrobat Reader left click of the icon Get Acrobat Reader and follow the instructions.

To find a web site when you do not know the address

When you connect to the World Wide Web the home page of the Internet Service Provider will appear. Somewhere near the top of the page will be a box labelled SEARCH. Type into the box the key words. For example if you are looking for the addresses of Local Authorities, you might type in LAs or Local Authorities. There are different companies which operate systems for searching the 'web'. These systems are called SEARCH ENGINES. The results of your search will depend on the SEARCH ENGINE used by your computer. Some search engines are UK specific, so if what you are looking for is contained in a UK web site you are likely to be more successful than if you use a search engine, which searches world wide sites.

1. Try searching for LAs. Was it successful?
2. Now try searching for Local Authorities. If, this is unsuccessful you will need to change to a search engine that searches only UK sites.

Some web sites contain links to many other sites. These are really just a gateway or PORTAL to a large number of sites dealing with the same subject area. The DfES web site acts as a portal site which links to a range of other government sites eg Ofsted, Qualifications and Curriculum Authority. They have their own web sites but you can also access them via the DfES site.

Learning Outcomes

Congratulations on completing the exercises for Module 3 Unit 3. You should now be able to:

- use the World Wide Web to access information.

Computer Security

Having mastered the above skills it is at this point a note of caution needs to be added. As you will be aware there are those who create viruses and other similar devices that cause damage to data and or software held on computers. Should a computer virus attack your computer, it will waste considerable amounts of your time and the time of anyone to whom it is forwarded. **Investment in anti-virus software, which is kept up-to-date, is very worthwhile.** There are other do's and don'ts in the table below.

Do	Don't
<ul style="list-style-type: none"> • Seek expert help immediately if you think your computer has been infected with a virus. • Treat with caution .jpg, .gif and .mp3 . They cannot be infected with a virus, but viruses can be disguised as these file types. • Call the sender to check that they intended sending it to you if you have any suspicion regarding an email, even if it comes from someone you know. • Treat screensavers, and movie films with the same amount of caution as other file types. 	<ul style="list-style-type: none"> • Download, run, or forward any unsolicited executable/programs, documents, spreadsheets etc. These can generally be recognised by the suffix in the name – the most common, potentially dangerous ones being .exe scr. vbs and .pif. • Open any files with double file extensions, for example, iamavirus.txt.vbs (txt and vbs are both extensions). • Remove a file from the Program Folder, after receiving a virus warning telling you to do so, without seeking expert advice. By doing so you could cause your own computer to malfunction

Assessment

At this point turn to the Assessment Book and complete assessment 3.3ii.

Module 4

Clerk as Adviser

Much of the advice given by a clerk is concerned with the law. Governing bodies must comply with the law, but at times they may wish to influence its formation through responding to consultations. Terms relating to the legal process are often used in meetings without any explanation of their meaning, for example, primary legislation, white paper, regulations etc.

In Unit 1 we explore how laws are made and what these terms mean. We then consider the types of legal advice which clerks may be called upon to give.

Clerks are also requested to advise, or seek advice on behalf of the governing body on policy matters. In Unit 2 we ask the question 'What are policies?' and look at the policy making process, before exploring the role of the clerk in supporting and advising the governing body in its strategic role of policy development.

Unit 4.1

Legislation and Advice

Legislation

The Department for Education and Skills drafts education legislation in accordance with the wishes of the Secretary of State for Education who is a member of the Cabinet and has the responsibility for implementing the government's education policy.

There are two types of legislation, primary and secondary, and the DfES provides circulars and guidance to schools giving instructions on how legislation should be put into effect. Because the terms primary and secondary are sometimes referred to in DfES documentation and clerks need to consult Circulars from time to time we will explore the legislative process in more depth.

Primary

Primary legislation refers to all those statutory requirements and duties that are stated in Acts of Parliament. They cannot be changed without the agreement of Parliament. Rather than putting all the statutory requirements into an Act, governments often prefer to write the Act in such a way that much of the detail can be drafted at a later stage.

Secondary

Legislation flowing from an Act, but not contained within it, is referred to as secondary legislation or more frequently the Regulations, sometimes shortened to 'the Regs'. The main advantage of secondary legislation for the government is that it can be changed without an Act of Parliament. The Statutory Instruments (Regulations) governing the work of governing bodies are secondary legislation.

Green Paper

In a previous module we referred to how the government consults with interested parties on the drafting of new legislation. Initially, the government puts forward its ideas in a Green Paper. Schools are sometimes among the consultees for Green Papers. Therefore, a Green Paper can be an item on a governing body meeting agenda. Local authorities are consultees and they may decide to seek the views of governing bodies.

White Paper

The second stage of the consultation process is frequently a White Paper. When the DfES has analysed and discussed with ministers the issues arising from the Green Paper consultation, then it will draft a second paper called a White Paper. Consultation on a White Paper is much wider and includes MPs. Again White Papers can be the subject of a governing body agenda item.

Bill

The next stage in the legislative process is a Bill, which goes through the stages shown in Diagram 4.1 before becoming law. Government departments do not always produce Green and White Papers, sometimes they go straight to the Bill. When the Bill has received the Royal Assent then it becomes law – an Act of Parliament. It is at this point that the DfES begins the work of writing the ‘Regulations’.

Diagram 4.1 Law Making Process		
Stages of the Bill	House of Commons	House of Lords
First Reading	Published and presented to MPs	Presented to Peers
Second Reading	MPs debate	Peers debate
Committee	Standing Committee with representatives from all parties discuss and propose amendments.	Detailed debate when amendments can be suggested
Report	Amended Bill presented to all MPs.	Bill discussed again and further amendments can be made.
Third Reading	Final debate	Final debate - amendments can still be put forward.
Royal Assent	Act of Parliament	

Bills are usually introduced in the Commons, going through the Commons stages before moving to the House of Lords. Occasionally Bills are introduced first in the Lords to expedite the flow of Parliamentary business. Before Royal assent the House of Commons considers any amendments made to the Bill by the House of Lords (Commons Consideration of Lords amendments). The House of Lords will then reconsider amendments made by the Commons, before the Bill is finally approved by the House of Commons.

Types of Advice

It is difficult to draw a dividing line between information and advice. Information was defined as an element of knowledge in Module 3. Advice involves giving an opinion. An opinion is based on an interpretation of the information, which could include analyses of data, or the linking of different pieces of information to support an opinion.

The advice which the clerk can be asked/expected to give can be divided into two categories.

- Legal Advice
- Good Practice Advice

Legal Advice

The main form of advice, critical to the effective functioning of a governing body is concerned with the framework of procedures within which the governing body fulfils its roles and responsibilities.

Procedural

Procedural advice is detailed in School Governance (Procedures) (England) Regulations 2003. The clerk will need to know the detail of this document and carry it with them to meetings so as to be able to advise the governing body on the rules for the conduct of meetings and the delegation of responsibilities to committees. School governance regulations will be updated from time to time, and it is important that the clerk keeps abreast of changes in the regulations.

The decisions of a governing body can be legally challenged. If there is evidence to show that a governing body did not conduct its meetings in accordance with the regulations, then its decisions may not be upheld in law. This places a considerable responsibility on the clerk to ensure that at all times he/she fulfils all legal requirements, for example, giving at least seven clear days notice of a meeting in writing. It also requires the clerk to give procedural advice as and when required in the meeting eg advising when the governing body is no longer quorate, or when a governor should leave the meeting because he/she has a pecuniary interest in the matter being discussed.

The governing body can choose to take, or ignore, the advice of the clerk. Ignoring the clerk's advice places the clerk in a difficult position. However, the advice given is a part of the business of the governing body meeting and as such should be included in the minutes.

Compliance

Like all organisations schools must comply with the law and governing bodies have a duty to ensure they do so. In addition to observing the Acts of Parliament discussed in Module 3, they also have a statutory duty to have policies in place for a range of areas of responsibility including child protection and performance management.

As clerk you will need to know what policies are legally required and advise on when they need to be reviewed. You may be asked to seek guidance on changes to the content, or to obtain model policies, which may be available from the DfES, local authority, church authority or a governor organisation. Again, it is important to record the advice given in minutes.

The Governors' Guide to the Law, published by DfES, provides a detailed guide to all legal requirements on governing bodies. Hard copies are available for the headteacher, all governors and the clerk. The up-to-date text is also maintained on GovernorNet.

Good Practice Advice

A wide range of communications are received by the chair and headteacher relating to governance of the school. The DfES, local authorities and for faith schools the church authority provide documents to governing bodies for information, comment and action. These documents can be lengthy and many governors will not read them for a variety of reasons including lack of time, and that experience tells them that much of the content will not be directly relevant to their individual school. Ignoring these documents is not a wise policy because a governing body may find itself losing out on opportunities or acting outside the law at a future time. The clerk can really benefit a governing body by (a) providing a summary and (b) identifying what is relevant to the individual school.

The governing body is responsible for several communications including the School Profile and School Prospectus. The minutes of meetings and the summary of Ofsted Reports are also forms of outward communication. The clerk may be asked to advise on the School Profile and/or Prospectus for which some of the content is presented in Regulations, provided electronically, and for which there will be DfES guidance. In advising the governing body you will need to first consult the latest guidance available from the DfES website, the local authority and publications on the subject giving advice on style and format.

Assessment

Turn to the Assessment Book and complete the assessments 4.1i and 4.1ii.

Unit 4.2

Policy, Procedures and Advice

Introduction

Policy development is one of the strategic tasks of the governing body. The clerk has a role in supporting the governing body by:

- (a) advising on the policies which are legally required and those which are recommended;
- (b) seeking advice and model policies for reference;
- (c) maintaining records of existing policies and advising on policy review dates;
- (d) recording reports of monitoring and evaluation of policy implementation in governing body meetings.

Policy like many words used in common parlance is seldom defined. It is important that the clerk has a clear understanding of what policies are, how they are developed, who has responsibility and the contribution of policy development to the effectiveness of the governing body.

Definition

A policy is a statement of the set of principles that guides conduct and action. Policy statements can usually be written on one side of A4 paper. Many policy statements are accompanied by a set of procedures that detail how the principles of the policy should be implemented and by whom. Good policies distinguish between principles and procedures. Sometimes the principles are stated as aims and the procedures as methods.

So what might a policy look like? In the Video Clip D the Curriculum Committee discuss a Whole School Monitoring Policy for Winsom School. A possible outcome is shown in Appendix 4.

In recording discussions a clerk can support the governing body by making the distinction between principles and procedures in the minutes.

Development Process

The policy development process is often lengthy and ongoing because of the need for each policy to be:

- consulted upon with all those affected by it;
- monitored and evaluated;
- reviewed at regular intervals.

Policies are not set in stone and as with national priorities, the school and its local community change and so the policies of the school need to respond to those changes.

The process involves the following steps:

1. draft the policy principles
2. consult about them
3. consider responses
4. finalise the policy
5. include success criteria
6. state who will monitor and when
7. evaluate and review in the light of the monitoring findings

How the governing body organises the above steps will vary depending upon:

- the area of activity for which the policy is being developed;
- the size of the governing body and its areas of expertise;
- previous practice.

For example, curriculum policies are usually developed by staff with some governing body input at the meeting of the Curriculum Committee, or committee with similar responsibilities.

Why have policies? While policy development may appear to be a time consuming and cumbersome task, particularly for a governing body with little experience of management tasks, there are many reasons why governors should be involved in policy development. Below are some of those reasons. *Can you think of any others?*

Policy development:

- enables the governing body to examine, understand and review school activity;
- enables people to be distanced from events and the principles of action to be established;
- enables the governing body to collectively agree a set of principles and promote an agreed corporate view;
- enables statements of what is wanted in the school to be made known;
- enables urgent questions to be addressed;

- enables improved decision making because it adds consistency to the way in which governors approach their strategic tasks;
- enables clear, unambiguous guidance to be given to the head teacher and staff;
- adds rigour to the planning framework and in so doing strengthens the strategic tasks of school improvement and securing the welfare of its pupils;
- avoids 'off the cuff' responses to situations;
- adds direction and rigour to meetings making them more purposeful and satisfying to all concerned.

Planning

One reason given above for policy development was that it strengthens planning. But policy development itself needs to be planned as do all other governing body activities, which revolve around the annual cycle of the school year. To help governing bodies with this task the DfES and some local authorities provide annual planners. They vary in format and content, but basically they enable the governing body to plan the strategic, monitoring and accountability agenda items for each term.

Assessment

The final assessment, 4.2, is to create an annual planner, a suggested format is given in the Assessment Book, but you may wish to create your own.

Congratulations on completing Modules 1 to 4. The final module is 'Clerk in Action' for which Consortium 52 wish you well. You will be guided through the final module by a clerk mentor.

Module 5

Clerk in Action

In this module you will be guided through the tasks associated with clerking by a clerk mentor (CM). This is an experienced clerk who you will work alongside you to clerk a governing body meeting. The tasks involved are grouped under six headings. Responsibility for each activity is indicated in the left-hand column.

Clerk Mentor/ Participant Responsibilities	Activities	CheckList
Organisation		
CM	Clerking the meeting takes place in accordance with SLA /manager and/or governing body wishes.	
CM	Agree a schedule of activities with the participant.	
Participant	Obtain a street map, prepare file and discuss dress code with clerk mentor.	
Preparation	Complete the following guided by a clerk mentor:	
Participant	Read minutes and agenda of previous meeting.	
Participant	Meeting with chair and head to negotiate the agenda.	
Participant	Finalise the agenda.	
Participant	Collate the agenda papers and reports.	
Participant	Distribute the agenda papers.	
Participant	Research, analyse and ensure an understanding of content of papers.	
Participant	Consider how the governing body might respond to the different agenda items.	
Meeting	Complete the following guided by a clerk mentor:	
Participant	Arrive at the school 20 minutes before the meeting.	
Participant	Prepare documents prior to meeting.	
Participant	Check the room is fully prepared.	
Participant	Pre-meeting discussion with Chair re: issues.	
Participant	Talk to the governors.	
Participant	Listen to discussions and make notes.	
Participant	Take the attendance list.	
Participant	Ensure chair signs the minutes.	
Participant	Give advice as and when required.	
Participant	Write an action list for the governing body.	
Participant	Write an action list for yourself.	
Participant	Collect up confidential items which may have been distributed at the meeting.	
Participant	Leave at an appropriate time having clarified details including date of next meeting.	

Clerk Mentor/ Participant Responsibilities	Activities	CheckList
Post-meeting Action	Complete the following guided by a clerk mentor:	
Participant	Write the draft minutes and distribute them in accordance with governing body instructions.	
Participant	Take follow-up action including making telephone calls and writing letters as agreed.	
Participant/CM	Amend the governing body records as appropriate.	
Participant/CM	Maintain the files, governing body records and where appropriate business records.	
Review and Evaluation		
Participant/CM	Independently complete the self-review sheet.	
CM	Discuss the student's performance in clerking the meeting with particular reference to preparation, meeting and follow-up action including the minutes.	
Participant/CM	Prepare Negotiated Assessment Statement.	
Action Plan		
Participant	Prepare an action plan, which addresses the main points from the review and identify the next steps and further support required.	
Participant	The Self-review, Assessment Statement and Action Plan should be added to your assessment portfolio.	

Appendix 1

Model Job Description and Person Specification

Model Job Description

1 Introduction

The clerk to the governing body will be accountable to the governing body, working effectively with the chair of governors, and with the headteacher and other governors. The clerk will be responsible for advising the governing body on constitutional matters, duties and powers and will work within the broad current legislative framework. He/she will secure the continuity of governing body business and observe confidentiality requirements.

2 Meetings

The clerk to the governing body will:

- (a) work effectively with the chair and headteacher before the governing body meeting to prepare a purposeful agenda which takes account of DfES, local authority and church authority issues and is focused on school improvement;
- (b) encourage the headteacher and others to produce agenda papers on time;
- (c) produce, collate and distribute the agenda and papers so that recipients receive them at least seven clear days, and preferably ten days before the meeting;
- (d) record the attendance of governors at the meeting and take appropriate action re absences;
- (e) advise the governing body on governance legislation and procedural matters where necessary before, during and after the meeting;
- (f) take notes of the governing body meetings to prepare minutes, including indicating who is responsible for any agreed action;
- (g) record all decisions accurately and objectively with timescales for actions;
- (h) send drafts to the chair and headteacher for amendment /approval by the chair;
- (i) copy and circulate the approved draft to all governors within the timescale agreed with the governing body;
- (j) advise absent governors of the date of the next meeting;
- (k) keep a minute book, or file of signed minutes, as an archive record;
- (l) liaise with the chair, prior to the next meeting to receive an update on progress of actions agreed previously by the governing body;

- (m) following the approval of the minutes at the next meeting forward a copy to the local authority, and where agreed, to the appropriate church or foundation authority;
- (n) chair that part of the meeting at which the chair is elected.

3 Membership

The clerk will:

- (a) maintain a database of names, addresses and category of governing body members and their term of office;
- (b) initiate a welcome pack/letter being sent to newly appointed governors including details of terms of office;
- (c) maintain copies of current terms of reference and membership of committee and working parties and nominated governors eg Literacy;
- (d) advise governors and appointing bodies of expiry of the term of office before term expires so elections or appointments can be organised in a timely manner;
- (e) inform the governing body, local authority and church authority (if appropriate) of any changes to its membership;
- (f) maintain governor meeting attendance records and advise the governing body of non-attendance of governors;
- (g) advise that a register of governing body pecuniary interests is maintained, reviewed annually and lodged within the school;
- (h) check with the local authority, and, where appropriate, the church authority that Criminal Records Bureau disclosure has been successfully carried out on any governor when it is appropriate to so.

4 Advice and information

The clerk will:

- (a) advise the governing body on procedural issues;
- (b) have access to appropriate legal advice, support and guidance;
- (c) ensure that new governors have a copy of the DfES 'A Guide to the Law for School Governors' and other relevant information;
- (d) take action on governing body's agreed policy to support new governors, taking account of the Guidance for Head Teachers and Chairs of Governors on the National Training Programme for New Governors and induction materials/courses made available by LAs and church authorities (if appropriate);
- (e) advise on the requisite content of the school prospectus and School Profile;

- (f) ensure that statutory policies are in place, and that a file is kept in the school of policies and other school documents approved by the governing body;
- (g) maintain records of governing body correspondence.

5 Professional Development

The clerk will:

- (a) successfully complete the National Training Programme for Clerks to Governing Bodies or its equivalent;
- (b) attend termly briefings and participate in professional development opportunities;
- (c) keep up-to-date with current educational developments and legislation affecting school governance.

6 Optional Extras

The clerk may be asked to perform as part of their duties any of the following. **These additional tasks will usually be negotiated at an extra cost.**

- (a) clerk some or all statutory and non statutory governing body committees;
- (b) assist with the elections of parent, teacher and staff governors;
- (c) give advice and support to governors taking on new roles such as chair or chair of a committee;
- (d) participate in, and contribute to the training of governors in areas appropriate to the clerking role;
- (e) maintain a file of relevant DfES, local authority and church authorities (if appropriate) documents;
- (f) maintain archive materials;
- (g) assist with the preparation of the School Profile, assembling the statutory information and copying and distributing the report;
- (h) prepare briefing papers for the governing body, as necessary;
- (i) help to produce a Governing Body Year Planner, which includes an annual calendar of meetings and the cycle of agenda items for meetings of the governing body and its committees.

Model Person Specification

This person specification lists the competencies expected of an experienced/fully-trained clerk. The two right-hand columns provide guidance for the appointment of new clerks. (E= Essential criteria, D = Desirable criteria)

	Sections		E	D
1	Skills, knowledge and aptitudes	<p>The clerk should be able to provide evidence of the following:</p> <ul style="list-style-type: none"> • good listening, oral and literacy skills; • writing agendas and accurate concise minutes; • ICT including keyboarding skills; • organising their time and working to deadlines; • organising meetings; • record keeping, information retrieval and dissemination of governing body data/documentation, to the governing body and relevant partners; • using the internet to access relevant information; • developing and maintaining contacts with outside agencies eg departments of the LA, Church Authorities and the DfES; • knowledge of governing body procedures; • knowledge of educational legislation, guidance and legal requirements; • knowledge of the respective roles and responsibilities of the governing body, the headteacher, the LA, Church Authorities and the DfES. • knowledge of Equal Opportunities and Human Rights legislation; • knowledge of Data Protection legislation. 	<p>E</p> <p>E</p> <p>E</p> <p>E</p>	<p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p> <p>D</p>
2	Qualifications and training	<p>The clerk should:</p> <ul style="list-style-type: none"> • be able to demonstrate a willingness to attend appropriate training and development; • have already attended or make a commitment to attend the National Training Programme for Clerks or its equivalent. 	E	D
3	Experience	<p>Clerks should be able to produce evidence of:</p> <p>relevant personal and professional development;</p> <p>working in an environment where experiences included taking initiative and self motivation;</p> <p>working as a member of a team.</p>		<p>D</p> <p>D</p> <p>D</p>

	Sections		E	D
4	Personal attributes	<p>The clerk should:</p> <ul style="list-style-type: none"> • be a person of integrity; • be able to maintain confidentiality; • be able to remain impartial; • have a flexible approach to working hours; • be sympathetic to the needs of others; • have an openness to learning and change; • have a positive attitude to personal development and training; • have good interpersonal skills. 	<p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p> <p>E</p>	
5	Special Requirements	<p>The clerk should:</p> <ul style="list-style-type: none"> • be able to work at times convenient to the governing body, including evening meetings; • be able to travel to meetings; • be available to be contacted at mutually agreed times. 	<p>E</p> <p>E</p> <p>E</p>	

Appendix 2

The Seven Principles of Public Life

The Seven Principles of Public Life from the Second Report of the Committee on Standards in Public Life (The Nolan Committee) [CM3270 1 May 1996].

Selflessness	Holders of public office should take decisions solely in terms of the public interest. They should not do so in order to gain financial or other material benefits for themselves, their family or their friends.
Integrity	Holders of public office should not place themselves under any financial obligation to outside individuals or organisations that might influence them in the performance of their official duties.
Objectivity	In carrying out public business, including making public appointments, awarding contracts, or recommending individuals for rewards and benefits, holders of public office should make choices on merit.
Accountability	Holders of public office are accountable for their decisions and actions to the public and must submit themselves to whatever scrutiny is appropriate to their office.
Openness	Holders of public office should be as open as possible about all the decisions and actions that they take. They should give reasons for their decisions and restrict information only when the wider public interest clearly demands this.
Honesty	Holders of public office have a duty to declare any private interests relating to their public duties and to take steps to resolve any conflicts arising in a way that protects the public interest.
Leadership	Holders of public office should promote and support these principles by leadership and example.

Appendix 3

Winsom School

A Whole School Monitoring Policy

Rationale

The staff and governing body of Winsom School are committed to raising standards, establishing high expectations, and promoting effective teaching and learning. Central to achieving this aim is the involvement of all members of the school community in the process of monitoring and evaluating the work of the school. The strategic direction of the school is stated in its policies implemented by the headteacher and staff. In this policy we set out the principles that guide our practice in relation to monitoring the work of the school. Our starting point is the impact of policy on the pupil and his/her learning needs.

Definitions

Monitoring is the process of seeking evidence to answer questions about the effectiveness of our school.

Evaluation is the weighing up of evidence and the review of current policies and practices in the light of the evidence.

Principles

1. All aspects of the work of the school encapsulated in its policies and practices should be monitored.
2. All members of the school community should be involved in appropriate monitoring and evaluation activities.
3. The outcomes of the monitoring and evaluation process should be used to promote high standards of achievement.

Procedures

1. The governing body monitors the impact of the policies through:
 - (a) a termly report from the headteacher about the impact of policy implementation;
 - (b) focussed visits to observe aspects of the work of the school;
 - (c) discussions with staff, pupils and parents.

In meetings the governing body regularly evaluates and reviews policies.

2. The headteacher and deputy head monitor the impact of the policies through:
 - (a) Discussions with staff and pupils;
 - (b) Observation of staff at work;
 - (c) Engaging with staff in planning activities;
 - (d) Scrutiny of pupil's work;
 - (e) Observation of pupils at work and at play;
 - (f) Discussions with parents.

The headteacher regularly reviews, with staff, the work of the school and from the evidence evaluates and changes the way in which policies are implemented. Major changes and the reasons for them are reported to the governing body on a termly basis.

3. Key Stage, subject and special educational needs co-ordinators monitor the impact of specific policies through:
 - (a) Discussions with staff and pupils;
 - (b) Observation of staff at work;
 - (c) Engaging with staff in planning activities;
 - (d) Scrutiny of pupil's work;
 - (e) Observation of pupils at work and at play;
 - (f) Discussions with parents.

They review practice in their areas of responsibility and make changes in consultation with colleagues. These changes are reported in staff meetings.

4. Classroom teachers monitor the work of the pupils and evaluate their responses to teaching methods, resources and assessment information. They review and evaluate their practice on a daily basis and record the methods and outcomes in their daily planning and assessments.
5. All staff working with pupils outside the classroom monitor their behaviour and responses to activities in relation to school policies and practices. They review with the headteacher the need for changes in practice on a regular basis.
6. Pupils monitor their own progress through reflection of achievements in all aspects of their development. Their views are sought on school and classroom practices emanating from school policies that affect the way in which they learn and develop as citizens. With pupils teachers evaluate and review practice and make changes as appropriate.

Review

Submission to the full Governing Body for ratification
Review date

November
Annual

Acronyms

There are a wide range of glossaries and guides to acronyms available. DfES, the governors associations and many local authorities produce them. The following list should not be regarded as exhaustive. Clerks could usefully add new ones to this list as they come across them.

ACE	Advisory Centre for Education
AOB	Any Other Business
ASE	Association for Science Education
ATL	Association of Teachers and Lecturers
ATM	Association of Teachers of Mathematics
BDA	British Dyslexia Association
CARE	Christian Action Research and Education
CASE	Campaign for State Education
CRB	Criminal Records Bureau
CRE	Commission for Racial Equality
DFE	Department for Education
DfEE	Department for Education and Employment
DfES	Department for Education and Skills
ECM	Every Child Matters
EDP	Education Development Plan
EOC	Equal Opportunities Commission
EAZ	Education Action Zone
GA	Geographical Association
GCE A Level	General Certificate of Education Advanced Level
GCSE	General Certificate for Secondary Education
GMBU	General Municipal and Boilermakers Union
GNVQ	General National Vocational Qualification
GTC	General Teaching Council
HMCI	Her Majesty's Chief Inspector of Schools
HMI	Her Majesty's Inspectorate
HA	Historical Association
IEP	Individual Education Plan
INSET	In-Service Education for Teachers
ISCG	Information for School and College Governors
LA	Local Authority
LMS	Local Management of Schools
NASG	National Association of School Governors
NAHT	National Association of Headteachers

NAPE	National Association for Primary Education
NASEN	National Association for Special Educational Needs
NASS	National Association for Small Schools
NATE	National Association of Teachers of English
NAS/UWT	National Association of Schoolmasters/Union of Women Teachers
NC	National Curriculum
NCPTA	National Council of Parent Teacher Associations
NCSL	National College for School Leadership
NGC	National Governors' Council
NPQH	National Professional Qualification for Headteachers
NUT	National Union of Teachers
Ofsted	Office for Standards in Education
PANDA	Performance and Assessment Report
PAT	Professional Association of Teachers
PSHE	Personal Social Health Education
PPA	Planning, Preparation and Assessment
PTA	Parent Teacher Association
PRU	Pupil Referral Unit
RE	Religious Education
QCA	Qualifications and Curriculum Authority
QUANGO	Quasi Autonomous Non-Governmental Organisation
SEF	Self Evaluation Form (Ofsted)
SEN	Special Educational Needs
SENCO	Special Educational Needs Co-ordinator
SHA	Secondary Heads Association
SIP	School Improvement Partner
SIP	School Improvement Plan
SLA	Service Level Agreement
SMA	Schools Music Association
TDA	Training and Development Agency
TEN	The Education Network
TGWU	Transport and General Workers Union
UKRA	United Kingdom Reading Association