



National Training Programme for Clerks to Governing Bodies

Distance Learning Guide



School Governors

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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 LEA 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 LEAs 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.

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Introduction

Welcome to the five-module National Training Programme for Clerks to Governing Bodies Distance Learning Programme, which you will be guided through by your course supervisor.

Your main resource is the Course Reader, which you can work through at your own speed with the aid of this Distance Learning Guide. In addition you will need the current Acts of Parliament and regulations that refer to school governance and '*A Guide to the Law for School Governors*'. Following the 2002 Education Act, all schools must reconstitute their governing bodies by 31 August 2006. Until that constitution has taken place, the 1999 School Government Regulations apply on constitutional (but not procedural) matters. You will need to keep abreast of changes and developments via the DfES website, from the local authority and where appropriate, the diocesan/church authority.

In the Distance Learning Guide each module is divided into two or three units which parallel the training sessions in the taught course. Each unit will take at least 3 hours. However, depending on your experience, you will find some units easy and quick to complete, while others will take more time.

For each unit there is a Task Sheet that indicates the competences, the learning outcomes, the tasks necessary to complete the unit of work and the links to the job description. The unit will always include written text but may also require you to watch a small section of video. You can check how well you have understood the material by completing the tasks in the Assessment Book.

The assessments are designed to give an overview of the main learning points in the module. The completed assessments will contribute to your portfolio of evidence, which will form the basis for discussion with your clerk-mentor. The portfolio will provide the evidence 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.

Module 1

The Governing Body

Unit 1 Clerks: The National Picture

National Education Management Standards

C112, D321, D322, D421, D422, D424, D425, D431, D471, D512, D521, D522, D523, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Watch the introductory video clip and see the notes in Task 1	
2	Assessment Book Complete the Self-assessment Activity 1.0	
3	Watch the introductory video clip again and note down all the competences mentioned by the clerks. Check these off against the Job Description and Person Specification in the Course Reader Appendix 1.	
4	Read the Course Reader Module 1 Unit 1	
5	Assessment Book Complete the Assessment Activity 1.1	

Links to Job Description

2(a),(c),(h) 3(f),(g) 4(f),(g) 5(a),(c) 6(c),(d)

Module 1 Unit 1

Task 1 Introductory Video Clip

In the video the clerks referred directly or indirectly to the following elements of the job description. The headings and letter points below match to the job description.

Job Description

- 2 Meetings
 - (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;
 - (c) produce, collate and distribute the agenda and papers so the recipients receive them at least seven clear days, and preferably ten days before the meeting;
 - (h) send drafts to the chair and headteacher for amendment/approval by the chair.
- 3 Membership
 - (f) maintain copies of current terms of reference 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.
- 4 Advice and Information
 - (f) ensure 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
 - (b) attend termly briefings and participate in professional development opportunities.
- 6 Optional Extras
 - (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.

Skills, Knowledge and Aptitudes

- John refers to ICT skills;
- Claire mentions you have to be good at time management;
- Pat enjoys meeting people and talking to headteachers;
- Barry enjoys meeting people and helping them;
- Denise and John both enjoy meeting people.

Qualifications and Training

- Denise attended courses
- Claire, Pat and John all shadowed an experienced clerk.

Special Requirements

- John comments on the awkward hours.

Module 1

The Governing Body

Unit 2 Governing Schools

National Education Management Standards

D471, D473, D474

Full statements can be found on www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read from Introduction to Recruitment of New Governors inclusive	
2	Course Reader Read: Roles and Responsibilities and Strategic Role	
3	Assessment Book: Assessment 1.2 Strategic Role	
4	Course Reader Read: Critical Friend Role	
5	Assessment Book: Assessment 1.2 Critical Friend Role	
6	Course Reader Read: Accountability Role	
7	Assessment Book: Assessment 1.2 Accountability Role	
8	Watch Video Scenario A and make notes on the advice given by the clerk and his role in the meeting.	
9	Course Reader Read from Governing Body Meetings to Working Parties inclusive.	
10	Assessment Book: Assessment 1.2ii and iii	
11	Course Reader Read from Ensuring Good Governance to end of the module.	
12	Activity: Do's and Don'ts of Good Clerking	

Links to Job Description

5(b),(c)

Module 1 Unit 2

Task 8 Video Scenario A Notes

This is the first of a sequence of video scenarios from a governing body meeting presented by the clerk to the governing body – Matt Clerk.

Matt Clerk is the clerk to the governing body of Winsom School. The chair, Mr Smith, takes his role very seriously, however, from time to time needs the guidance and support of Matt Clerk.

The headteacher, Mrs Goodhead, is quite experienced and has a clear idea as to where the governing body's responsibilities end, and hers begin.

Matt Clerk, Mr Smith and Mrs Goodhead are all played by actors. The video scenarios are intended to reflect a real governing body meeting and where possible good practice.

The governors have gathered in the staff room before the meeting. Matt Clerk introduces the video and then we see the governors coming along the corridor to the room where the meeting is to take place. Matt speaks with the chair and shakes hands with the headteacher while the governors take their seats.

Note the following:

- 1 The layout of the room - with the governors sitting at tables in a horseshoe so they can all see each other and with space for their papers.
- 2 Name labels for governors are particularly helpful to the clerk and to new governors.
- 3 The clerk needs to be seated in a position where s/he can discreetly give advice to the chair.
- 4 Starting the meeting on time gives consideration to those who made the effort to arrive on time.
- 5 The chair introduces and welcomes Matt Clerk to the governing body. All governors now know who he is, and what he does.
- 6 The chair takes the standard items at the beginning of the meeting.
Note:
 - (a) The need to accept apologies.
 - (b) Whether or not to record a governor absent who is believed to be coming to the meeting.
 - (c) Approval of the minutes is concerned with their accuracy as a true record.
 - (d) Winsom Governing Body asks for a proposer and a seconder for approval of the minutes. Other governing bodies may require a consensus.
 - (e) The chair signs every page of the minutes, if they are to be kept in a loose-leaf file.
 - (f) The agenda item 'Matters arising' is extended to include the phrase "...not included elsewhere on the agenda".

We will return to Video Clip A in Module 2.

Winsom School is purposely not identified as being of any particular phase.

Module 1 Unit 2

Task 12 Dos and Don'ts of Good Clerking

Having read Ensuring Good Governance make your own notes on what you think good clerks should and should not do.

Do	Don't

Compare your ideas with those suggestions on the next page. The list is not exhaustive.

Module 1 Unit 2

Task 12 Suggested Answers

Possible Dos and Don'ts of Ensuring Good Clerking (Suggestions)

Do	Don't
<ul style="list-style-type: none">✓ Keep to deadlines.✓ Remain impartial.✓ Value the different perspectives of governors, and accept that all governor stakeholder groups have equal access and all share a concern for the welfare of pupils.✓ Recognise the collective responsibility of the governing body in the way the business is recorded in the minutes.✓ Reflect in the minutes governors, collective and individual responsibility to act fairly and without prejudice.✓ Assist the governing body to demonstrate in their work open governance and effective communication.✓ Support the governing body in working as a team.✓ Seek to develop effective working relationships with the governors, headteacher, the local authority and other relevant agencies and the local community.	<ul style="list-style-type: none">✗ Arrive late.✗ Give personal views.✗ Discuss matters relating to individual staff or students.✗ Discuss potentially contentious issues affecting the school outside the governing body.✗ Disseminate in the community information that may not be confidential but is sensitive.

Module 1

The Governing Body

Unit 3 The Language of School Improvement

National Education Management Standards

D471, D473, D474

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read from Introduction to the end of the section on Assessment inclusive	
2	Assessment Book Complete Assessments 1.3i and 1.3ii	
3	Course Reader Read from Inspection to the end of the module	
4	Assessment Book Complete Assessment 1.3iii	

Links to Job Description

5(b),(c)

Module 2

Clerk as Administrator

Unit 1 Meeting Preparation

National Education Management Standards

C112, C212, D331, D332, D521, D522, D523, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read the Introduction and Telephone Conversation	
2	Complete the activities for CD ROM Clip G	
3	Course Reader Read: Tasks before the Meeting to the end of the module	
4	Assessment Book Complete Assessments 2.1i-ii	

Links to Job Description

2(a),(b),(c),(f),(g),(h),(i),(j),(k),(l),(m) 6(a),(b),(c),(j),(k)

Module 2 Unit 1

Task 2 CD ROM Clip G

Matt has received a message to telephone Michelle. Michelle is very busy.

Watch the introduction and Option 1

Make your own notes on the following:

- How does Matt introduce himself to the member of staff on the switchboard?
- How would you introduce yourself in the same situation?
- Was Matt prepared for the conversation?

Watch Option 1

- When Michelle puts the phone down – does Matt have a problem?
- If so, what should he have done to avoid it happening?

Watch Option 2

Make your own notes on the following:

- Was Matt prepared for the conversation?
- What skills was Matt Clerk using to make sure he had fully understood what was required?

Check your notes against the points on the following page.

Module 2 Unit 1

Task 2 Activity Notes

Interactive CD Rom Clip G

Introduction

Matt Clerk comes into his office and finds a message on his desk to telephone Mrs Goodhead, the headteacher of Winsom School.

Option 1

Matt telephones the school:

- he does not properly introduce himself to the switchboard operator;
- he has not thought about what Mrs Goodhead might want to speak with him about;
- he does not question Mrs Goodhead, when he does not fully understand;
- at the end of the conversation his notes read:
 - SENCO
 - Turf account
 - Bowels Association

Option 2

Matt telephones the school:

- he has the agenda to hand;
- he interrupts and questions Mrs Goodhead when he does not fully understand;
- at the end of the conversation his notes will read:
 - SENCO Special Educational Needs Coordinator
 - Turf Account – re turfing of the playing field account
 - Bowls Association

Learning points

- before making a call have the school's file to hand;
- introduce yourself fully and give the purpose of the call;
- listen carefully, but be prepared to interrupt and question to ensure you have fully understood the message;
- make notes during the conversation and add the date and time and file for future reference;
- no matter how rushed the person you are speaking to might be, do not end a call until you are quite clear as to what you are expected to do, or arrange to call back at a later time.

NB The chair determines the agenda, Matt reminds the head when he says "...with the chair's approval of course."

Module 2

Clerk as Administrator

Unit 2 Meetings and Minutes

National Education Management Standards

C112, C212, D321, D331, D332, D421, D422, D424, D521, D522, D523, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read: Introduction and Preparing to take Minutes Complete Task 1	
2	Course Reader Read: Minutes	
3	Watch Video Scenarios A, B, and C Complete Task 3	
4	Assessment Book Complete Assessment 2.2	
5	Course Reader Read: After the Meeting and Health and Safety	

Links to Job Description

2(a),(b),(c),(d),(f),(g),(h),(i),(j),(k),(l),(m) 4(d) 6(a),(b),(c),(j),(k)

Module 2 Unit 2

Task 1 Preparing to take Minutes

The clerk is preparing to minute the meeting of the Winsom School Governing Body. The agenda has been divided into four parts:

Procedural

Monitoring/Accounting

Strategic Decisions/Discussion

Information

Is this division helpful, and if so why?

How can the clerk prepare for taking the minutes in the meeting?

Below is a sample agenda for a governing body meeting, create a proforma in preparation for taking minutes.

<p style="text-align: center;">Governing Body Agenda</p> <p style="text-align: center;">Winsom School Governing Body Agenda</p> <p>Procedural</p> <ol style="list-style-type: none">1. Apologies for absence and their acceptance.2. Minutes of the Governing Body Meeting held on3. Matters arising <p>Monitoring/Accountability</p> <ol style="list-style-type: none">4. The Headteacher's Report5. Governing Body Self-evaluation 6. Date of future meetings7. Other Business

NB The above agenda matches the video extracts for Video Clips A and B, but not C.

Module 2 Unit 2

Task 3 Minute the Meeting in Video Scenarios A, B and C

Watch video scenarios A, B and C and take notes in preparation for writing the minutes of the meeting.

After taking notes from the video check your notes against those below. These were provided by an experienced clerk to a governing body and are reproduced here exactly as written while watching the video clips.

Sample Notes

New clerk Mr Matt Clerk welcomed to the meeting

1. Apologies/A Mrs E Duncan, Mr M Smith
(Cllr Robson – may be late?)

2. Minutes of Prev. Mting
Signed & approved
4.5 P2 McGwyre not Maguire (Builder)

(Cllr Robson entered the meeting)

3. M/A from mting
None raised

4. HT report
Already received with agenda
 - (a) Standards of Achievement
Nat Att tests next term – teachers report pupil well motivated – should do as least as well as last year.
Inset courses on assessment and new ass software has assessed their skills in using assessmt info.
 - (b) Behaviour Policy
Seen parents of 2 bys who school had problems with.
Agreed to work with school. attendance and attitude
If cause more problems, next step would be exclusion.

Qu *Ass information

-To identify areas of learning and then can set activities to support those areas of learning.

* Revised beh policy at last meeting (agreed) Now implemented. Yes now in place and working well.

5. GB Self Ev
Clerk contacted Gov Services Agreed to contact LA last mting
Book arrived last week
Discussed need for this – things GB could do better 'role of critical friend' – help to evaluate
Identify strengths and weaknesses
HT useful with staff (found)

Resolved:

- (i) arrange trg with LA Training (link Gov)
- (ii) Trg gov to let clerk know date asap so can advise govts.

Module 3

Clerk as Information Manager

Unit 1 Managing Information

National Education Management Standards

D321, D331, D431, D522, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read: Managing Information	
2	Assessment Book Complete Assessment 3.1	

Links to Job Description

2(k) 3(a),(c),(d),(e),(f),(g),(h)

Module 3

Clerk as Information Manager

Unit 2 Electronic Management of Information

National Education Management Standards

D321, D331, D431, D522, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read: Introduction	
2	Assessment Book Complete Self-assessment activity 3.2i	
3	Course Reader: complete some or all/some of Exercises 1-7	
4	Assessment Book Complete Assessment 3.2ii	

Links to Job Description

2(c),(f),(g),(k),(m) 3(a)

Module 3

Clerk as Information Manager

Unit 3 Electronic Communication

National Education Management Standards

C111, C211, D333, D431, D512, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read: Introduction	
2	Assessment Book Complete Self-assessment activity 3.3i	
3	Course Reader: complete those exercises identified in the self-assessment activity. (Exercises 8-11)	
4	Assessment Book Complete Assessment 3.3ii	
5	Course Reader Read: Computer Security	

Links to Job Description

2(h),(i),(j),(m) 4(b),(e)

Module 4

Clerk as Adviser

Unit 1 Legislation and Advice

National Education Management Standards

C111, C211, D331, D332, D333, D431, D512, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read: to the end of Types of Advice	
2	View Interactive CD ROM Scenario E – see notes for Task 2	
3	Course Reader Read: Legal Advice and Good Practice Advice	
4	Complete the activity on Types of Advice	
5	View Interactive CD ROM Scenario F – see notes for Task 5	
6	Assessment Book Complete Assessment 4.1i and 4.1ii	

Links to Job Description

2(e),(n) 4(a),(b) 5(b),(c) 6(g)

Module 4 Unit 1

Task 2 Giving Information/Advice

Interactive CD ROM Case Study Scenario E

View the introduction to the case study on the CD ROM. Note your responses to the questions.

A governor has to leave the meeting because his son has broken his arm. The meeting is no longer quorate.

Watch Option 1

- 1 Does the clerk give the governing body information or advice?
- 2 How does the clerk's input affect the outcome of the meeting?

Watch Option 2

- 1 Does the clerk give the governing body information or advice?
- 2 How does the clerk's input affect the outcome of the meeting?

Watch Option 3

- 1 Does the clerk give the governing body information or advice?
- 2 How does the chair react to the clerk's input to the meeting?
- 3 How do you think the clerk might feel about the chair's response?
- 4 Write the statement for the minutes recording the governor leaving and the chair deciding to continue with the meeting even though it is inquorate.

NB

If a meeting becomes inquorate due to whatever reason, the meeting can continue to discuss the agenda issues providing that:

- 1 the clerk records the close of the formal meeting;
- 2 no decisions are taken during the informal meeting;
- 3 all proposals resulting from the informal discussion are placed on the agenda for the next meeting with the opportunity for a full discussion should the governors so wish.

As clerk you will need to record the informal meeting.

Module 4 Unit 1

Task 4 Types of Advice

Sort the following statements into the two different types of advice.

The address of the school should be in the School Profile.	
Without 50% of the governing body members in post present the meeting is not quorate to make a decision.	
The correct form of address for an Anglican bishop is the Right Reverend...	
The law requires the governing body to make a statement on 'Sex Education'.	
The minutes of the meetings may be kept in a loose-leaf file providing the pages are consecutively numbered, and when approved each page is signed by the Chair.	
The governing body should have a curriculum policy.	
Agenda Item 4.2 the Consultation document relates to a number of items specific to secondary schools, however as a primary school the governing body may wish to respond to the item relating to truancy.	

NB Suggested answers can be found on the next page.

Module 4 Unit 1

Task 4 Types of Advice (suggestions)

The address of the school should be in the School Profile.	L
Without 50% of the governing body members in post present the meeting is not quorate to make a decision. .	L
The correct form of address for an Anglican bishop is the Right Reverend...	G
The law requires the governing body to make a statement on 'Sex Education'.	L
The minutes of the meetings may be kept in a loose-leaf file providing the pages are consecutively numbered, and when approved each page is signed by the Chair.	L
The governing body should have a curriculum policy.	L
Agenda Item 4.2 the Consultation document relates to a number of items specific to secondary schools, however as a primary school the governing body may wish to respond to the item relating to truancy.	G

L = Legal

G = Guidance

Module 4 Unit 1

Task 5 Video Scenario F Notes

The chair has received a consultation document to which the governing body are invited to respond.

The clerk has identified only three matters which are specifically relevant to this governing body, and which he thinks they may wish to comment on.

One governor queries his advice and blames 'the authority' whoever they may be. This brings to the fore the frustration some governors feel at the demands made on them, and the need to find a scapegoat – the government, the authority and the clerk are all targets.

The clerk has tried to be helpful to the governing body, but his advice is being questioned.

Following each option note:

- How do the other governors respond to the clerk's advice being challenged?
- How does the chair respond to the clerk's advice being challenged?
- How does the headteacher respond to the clerk's advice being challenged?
- What are the benefits to the governing body of the clerk analysing documents prior to the meeting and drawing the governors' attention to those parts which are particularly relevant to them?
- What are the disadvantages?

Module 4

Clerk as Adviser

Unit 2 Policy, Procedures and Advice

National Education Management Standards

C111, C211, D321, D322, D331, D332, D333, D431, D512, D522, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Course Reader Read: Introduction to Why have Policies?	
2	View Video Scenario D – see notes for Task 2	
3	Course Reader Read: Planning	
4	Assessment Book Complete Assessment 4.2	

Links to Job Description

4(a),(b),(c),(e),(f)

Module 4 Unit 2

Task 2 Video Scenario D

The Curriculum Committee of the governing body are meeting to discuss writing a 'Whole School Monitoring Policy'.

Unlike some other committees the curriculum committee has few decision-making powers. Its main tasks are to monitor standards of pupil achievement and prepare policy documents for the governing body committee to approve.

The chair of the governing body also chairs the curriculum committee in this school, although it could be another governor.

Other members of the curriculum committee include headteacher, a teacher governor and another governor.

Watch the video clip.

What do you conclude from the video about the procedures for governing body committees?

What is the process for the development of this policy?

How could the clerk support the curriculum committee in developing this policy?

Module 5

Clerk in Action

National Education Management Standards

C111, C112, C211, C212, D321, D322, D331, D332, D333, D421, D422, D424, D425, D431, D471, D473, D474, D511, D512, D521, D522, D523, D524

Full statements can be found at www.virtualstaffcollege.co.uk

Tasks

	Activity	Completed
1	Meet with the clerk mentor to confirm the details for clerking a governing body meeting	
2	Complete the preparation for the meeting	
3	Clerk the meeting	
4	Complete all post-meeting tasks as agreed	
5	Complete the review tool	
6	Meet with the clerk mentor to discuss the review tool and to complete the assessment statement	
7	Complete the assessment portfolio and submit for accreditation	

Links to Job Description

All

Module 5

Clerk in Action – Checklist

In this module you will be guided through the tasks associated with clerking by a clerk mentor (CM). This is an experienced clerk who 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	Check List
Organisation		
CM	Clerking the meeting takes place in accordance with agreement with SLA /manager and/or governing body wishes.	
CM	Agree a schedule of activities with the clerk mentor.	
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	Attend 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, analyses 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 makes 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	Check List
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 and where 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 participant's performance in clerking the meeting with particular reference to preparation, meeting and follow-up action including the minutes.	
Participant/ Mentor	Prepare Negotiated Assessment Statement.	
Action Plan		
Participant	Prepare an action plan, which addresses the main points from the review and identifies the next steps and further support required.	
Participant	The Self-review, Assessment Statement and Action Plan should be added to your assessment portfolio.	

