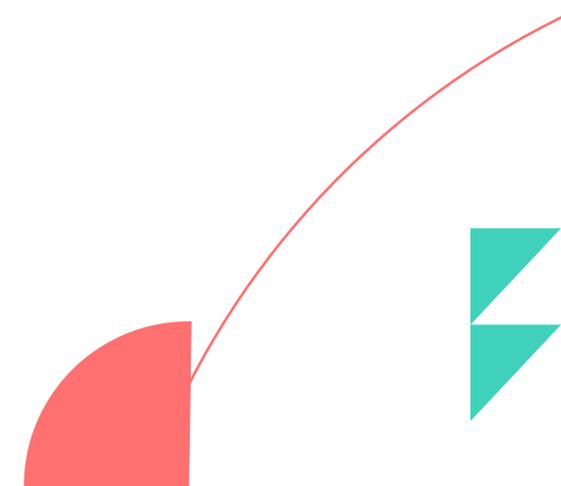


Clerking Essentials: a practical introductory programme for clerks

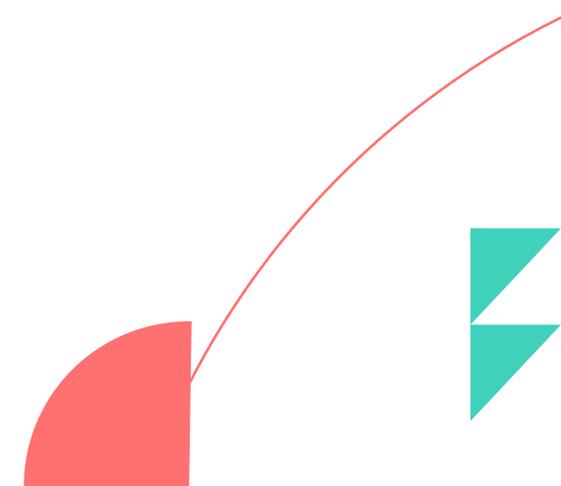
Welcome and introduction

An outline of today's session

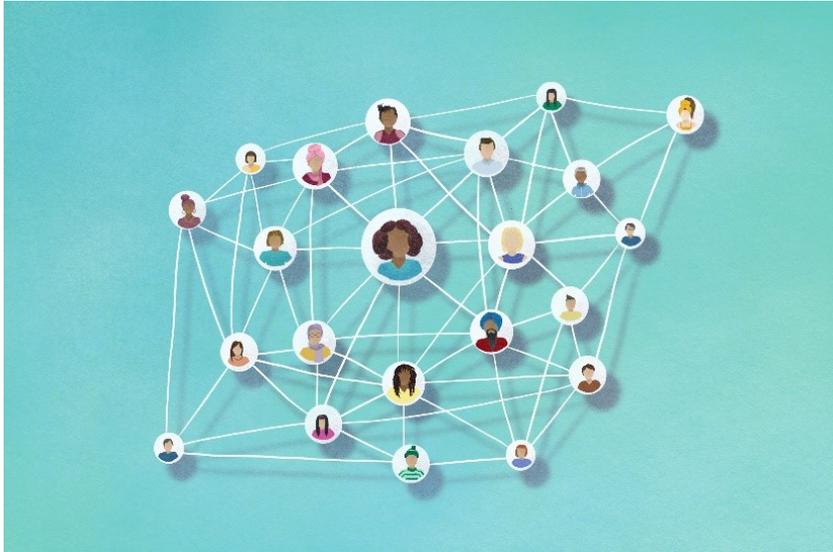
- To welcome you to the programme
- To help you get to know one another
- To briefly outline the aims, purpose and structure of the programme
- A look at how you will learn on the programme
- What to do to complete the programme successfully
- What to do if you have any questions



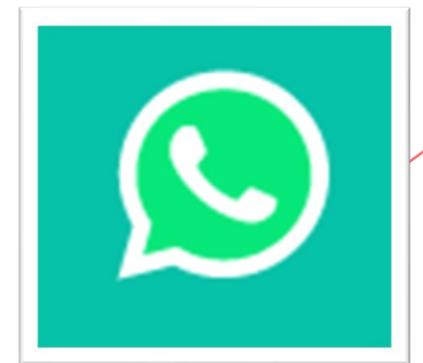
Welcome and group introductions



Setting up a network



- Building a professional network is very helpful
 - Especially networks beyond your normal sphere
- If you're happy to be part of a WhatsApp group, add your phone number to the chat
- Beware of boundaries
 - Operate professionally
 - Remember confidentiality
 - No GIFs, profanities, jokes



Programme aims and purpose

Understanding governance

How to work with those governing, senior leaders and others

How to establish a reliable approach to using essential rules and guidance

How to complete some key clerking tasks effectively

What to do next - identifying actions to further develop your practice

Programme structure, methodology and assessment

Session 1 Welcome and Introduction

Today, week 1

Not assessed



Complete modules 1-4 & attend consolidation Session 2

Weeks 1-3, approx 6hrs study

Assessed - compulsory



Complete modules 5-8 & attend consolidation Session 3

Weeks 4-6, approx 6hrs study

Assessed - compulsory

E-learning modules 1-4

1. What does the governance professional do?

- An outline of what is expected of clerks when they start in the role and then moving beyond.
- Develops your awareness of the career development of a clerk and the need for you to define the scope of any clerking role you undertake

2. How governance works

- Find out what governance is, what those governing do, what effective governance looks like
- Allows you to start to explore how to work as part of the governance team, with the chair the senior leaders and others

3. How to: clerk in different types of school organisation

- An outline of the many types of school organisation and the impact of this for the governance professional
- Enables you to appreciate the need to work out what sort of organisation you are clerking in and how to navigate this

4. How to: find different sources for governance

- A practical introduction on how to access and use the many sources of law, rules, regulations and guidance that the governance professional needs to work with to ensure that their boards are effective and compliant.

Session 2 - Understanding your clerking environment

This Session will be an interactive session with polls and group work and the opportunity to ask questions.

The intention is to see how the learning in modules 1 to 4 might be applied in practice and to consolidate the learning from the modules.

We will look at what you might expect as a new clerk and what might be expected of you. This will include how governance works and finding and using the rules and guidance that applies to each type of school or organisation.

Note: the pre-work set prior to the Session MUST be completed.

Go to
Poll #....

Go to
Canva

Breakout
rooms

The remaining e-learning modules

5. How to: arrange meetings

- This demonstrates how the governance professional can help with the scheduling, agenda setting and organisation of meetings
- This in turn will enable you to support your board to fulfil its governance functions more effectively

6. How to: effectively minute a meeting

- A step by step walk through of the process and skills, techniques and behaviours involved in producing minutes.
- What steps you can take to ensure they are accurate and compliant

7. How to: manage information and documents

- An overview of the information and records you will need to create and accurately maintain for your board to comply with law, policy and best practice
- A practical look at how you might approach keeping and filing these records

8. How to: support the recruitment, appointment, election and retirement of governors and trustees

- An understanding of the importance of having the right people with the right skills around the governing board table.
- Practical information on the processes involved depending on the context within which your board operates

Session 3 - clerking your first meeting

This Session will also be interactive with polls and group work and the opportunity to ask questions. There are three of these Sessions, each in a different setting, maintained school, academy trust board and MAT local governing body. Participants must study one but for a small additional fee can opt to study two or all three.

We will explore how to apply your learning from modules 5-8 in practice and consequently consolidate the learning from the modules studied.

Session 3 will use a case-study to focus on what the clerk needs to do to organise, attend and support a meeting and how to action any potential follow up that is needed. In each of the three Session 3s we will use the regulations, rules and good practice relevant for the setting.

- Note: the pre-work set prior to Session 3 MUST be completed before you come.

Go to
Poll #....

Go to
Canva

Breakout
rooms

A word about optional next steps and further study

- Some e-learning modules and Sessions 2 and 3 contain suggestions for optional next steps and further study
- You may want to have a look at some of the optional things, but they are just that, optional.
- So, for the purposes of the Clerking Essentials programme we recommend that you focus your time on the required learning.
- But we do encourage governance professionals to take responsibility for their own development.
- So, if you do have the time, it can be useful and stimulating to explore something new or a topic in more depth which is why the optional suggestions are included.

What does the governance professional do?

Optional next steps

Here are some activities you may find useful to implement your learning in this module:

1. Compare your role description(s) with the model role description in Resources to see if there are other ways in which you could help the board(s) you work with
2. See if the code(s) of conduct your board(s) use apply to you
3. Check if any of your role descriptions need to be reviewed
4. Consider keeping a record of the work you have done to inform your annual appraisal conversation
5. Consider arranging regular meetings with your chair(s), unless you have already done so



Optional further study

- Explore the NGA Knowledge Centre for further information and guidance (some information is also available to non-members)



What to do if you have any questions

Questions about aims, structure and assessment of the programme

- Examples
 - Q. What to do I have to do to complete the programme?
 - Q. Where are the materials I need for Session 2?
- First check the “How to complete your Clerking Essentials programme” module on the Leading Governance Portal” – it explains these things
- If you cannot find the answer, please contact leading.governance@nga.org.uk
- Please raise your questions in the Sessions, don't be shy!

Questions about clerking or governance

- Just ask your tutor in one of the Sessions, don't be shy!

Questions about programme administration

- Examples
 - Q. I don't seem to have received a Zoom invite for a Session
 - Q. What if I cannot attend a Session?
 - Q. What if I want to sign up for another Session 3?
- First, check the answers in the FAQ resource you can find in the “How to complete your Clerking Essentials programme” module
- If you cannot find the answer, please contact leading.governance@nga.org.uk

The Leading Governance Portal - aka LGP

The screenshot displays the NGA Leading Governance Portal. At the top left is the NGA logo with the text "Leading Governance". At the top right is the "Enable" button. Below the header is a row of six circular icons representing different portal sections: Learning (graduation cap), Awards (certificate), Events (calendar), Assignments (clipboard), Groups (two people), and Staff (person with ID card). Below this row are three main content cards: 1) NGA For Schools & Trusts membership information with the text "Click here to find out more about NGA Membership"; 2) Evalu8 appraisal information with the text "Login to Evalu8 to complete your 360° appraisal!"; and 3) Messages with an envelope icon. To the right of these cards is a calendar for September 2024, with the 8th highlighted in purple. At the bottom left are links for "Terms & Conditions" and "Help & Support".

NGA Leading Governance

Enable

Learning Awards Events Assignments Groups Staff

NGA For Schools & Trusts
Click here to find out more about NGA Membership

evalu8
Login to Evalu8 to complete your 360° appraisal!

Messages

September 2024

MON	TUE	WED	THU	FRI	SAT	SUN
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

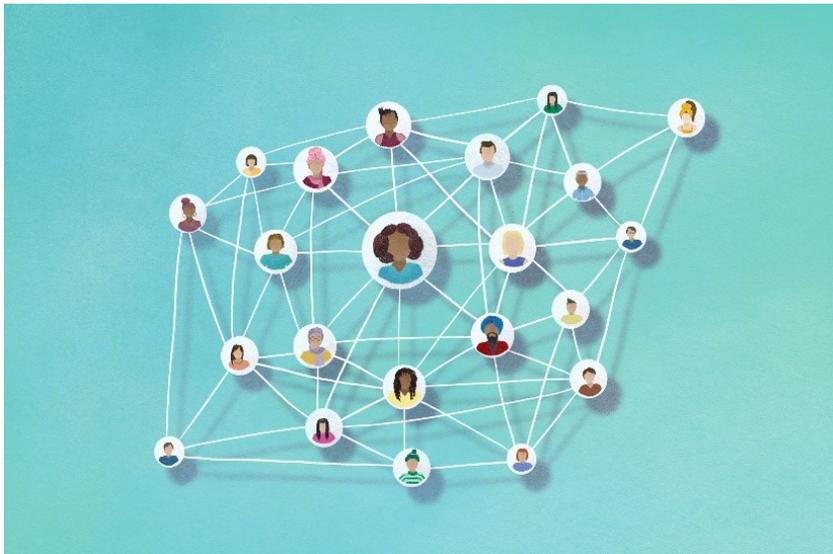
Terms & Conditions Help & Support

What's next?

After this Session 1 you will need to

- complete the e-learning modules 1-4
- complete the pre-work that has been set for Session 2

And don't forget to consider networking opportunities with your peers!



And finally –
any questions?

