

How to: manage information and documents

Common records maintained by clerks

How to use this document

This checklist can be used by governance professionals in all school settings as a guide to which records they could be expected to maintain.

	Record	Maintained	Essential/ Desirable	Academy trust	Essential/ Desirable
1	Meeting minutes	Y	E	Y	E
2	DBS checks	Y	E	Y	E
3	Register of interests	Y	E	Y	E
4	Register of trustees (directors)	N/A	N/A	Y	E
5	Record of appointments to governing board and term of office	Y	D	Y	D
6	Governor/trustee attendance	Y	E	Y	E
7	Scheme of delegation	N/A	N/A	Y	E
8	Committee structure / membership	Y	E	Y	E
9	Committee terms of reference	Y	E	Y	E
10	Funding agreements	N/A	N/A	Y	E
11	Articles of association	N/A	N/A	Y	E
12	Instrument of government	Y	E	N/A	N/A
13	Governor visit logs	Y	D	Y	D
14	Training records	Y	D	Y	D
15	Policy review schedule	Y	D	Y	D
16	KCSIE reading records	Y	D	Y	D
17	Audited accounts	N/A	N/A	Y	E
18	School fund (if school has one) records and accounts	Y	E	Y	E
19	Governor details on website & GIAS	Y	E	Y	E
20	Data protection / privacy statement	Y	E	Y	E
21	Senior executive leader HR records	Y	E	Y	E
22	Skills audit	Y	D	Y	D
23	Code of conduct	Y	D	Y	D
24	Governance reviews	Y	D	Y	D
25	Declaration to become a governor / trustee eligibility	Y	D	Y	D

This list is not an exhaustive list of all records but contains most of the common records maintained by governance professionals.



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