

# How to: Clerk in different types of school organisation

Differences between settings and their importance to clerks

AREA OF DIFFERENCE	MAINTAINED			ACADEMY TRUST				RELEVANCE FOR CLERK
	MAINTAINED	FEDERATION	FAITH	SAT	MAT	FAITH	MAT school-level	
<b>TERMINOLOGY</b>								
<b>Title of the governing board</b>	governing body	governing body	governing body	trust board	trust board	board of directors	academy committee (or others like local governing body, academy council, local academy board)	For correct references in all communications and documents
<b>Title of board member</b>	governor	governor	governor	trustee	trustee	director	various	To identify responsibilities of board member
<b>ACCOUNTABILITY</b>								
<b>For fulfilling the core functions</b>	governing body	governing body	governing body	trust board	trust board	board of directors	trust board	For directing relevant information, updates, advice, and guidance on the core functions
<b>For all decisions and actions</b>	governing body	governing body	governing body	trust board	trust board	board of directors	trust board	To direct queries as appropriate
<b>To whom</b>	LA	LA	LA	ESFA	ESFA	ESFA	trust board	To refer to the correct higher authority when appropriate

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<b>To Ofsted</b>	governing body	governing body	governing body	trust board	trust board	board of directors	academy committee	To assist with providing appropriate documentary evidence for inspection
<b>For safeguarding</b>	governing body	governing body	governing body	trust board	trust board	trust board	trust board	to fulfil the safeguarding obligations of the role
<b>SCHOOL LEADERSHIP AND MANAGEMENT</b>								
<b>Title of senior executive leader (SEL)</b>	headteacher	headteacher or executive headteacher	as for non-faith	headteacher (or principal)	CEO (or executive headteacher/ principal)	as for non-faith	headteacher (or head of school, principal)	To help understand roles and responsibilities and hierarchies
<b>SEL reports to</b>	governing body	governing body	governing body	trust board	trust board	board of directors	usually CEO or executive principal	To understand the line management structure
<b>SEL appraisal and pay awards completed by</b>	governing body	governing body	governing body	trust board	trust board	board of directors	usually CEO or executive principal	To know who should be involved in the SEL appraisal when forming a review panel
<b>All staff ultimately managed by</b>	headteacher	headteacher	headteacher	headteacher	CEO	CEO	headteacher	To understand the line management structure

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Governing board holds to account	headteacher	headteacher	headteacher	headteacher	CEO	CEO	headteacher	To know which member of the school staff is responsible for implementing the board's strategy
SEL reports for board meetings produced by	headteacher	headteacher	headteacher	headteacher	CEO	CEO	headteacher	To know who to request reports from to be sent with meeting agendas
Chair works with	headteacher	headteacher	headteacher	headteacher	CEO	CEO	headteacher	To understand the line management structure
Clerk arranges board meeting agendas with	headteacher	headteacher	headteacher	headteacher	CEO	CEO	headteacher	In addition to the chair of the board this is the other person who will add to the meeting agendas
Who to chase for board meeting papers from staff	headteacher	headteacher	headteacher	headteacher	CEO	CEO	headteacher	To know who to approach if meeting papers or reports are not received
<b>EMPLOYER</b>								
All staff employed by	LA	LA	LA	trust	trust	trust	trust	May be relevant for their own contract of employment but also if disciplinary or pay review panels need to be formed

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School HR policies set by	governing body	governing body	governing body	trust board	see SOD	see SOD	see SOD	To ensure the review of HR policies are included on the relevant meeting agenda for approval.
HR support provided by	LA	LA	LA	trust	usually trust	usually trust	usually trust	To know who will provide updates to HR policies in line with the organisation's policy review cycle or in response to legislation changes
<b>PREMISES</b>								
Who owns the school premises?	LA (except VC, VA, and foundation schools)			trust	trust	trust	trust	To be able to advise the board if decisions need to be made about the premises
Who is responsible for the premises?	LA (except VC, VA, and foundation schools)			trust	trust	trust	only to the extent delegated	To be able to advise the board if decisions need to be made about the premises

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<b>GOVERNANCE STRUCTURES</b>								
<b>Legal position</b>								
<b>Are there Members (other than board members)?</b>	no	no	no	no	yes	yes	yes	To be able to advise
<b>Which is the accountable body?</b>	governing body	governing body	governing body	trust board	trust board	board of directors	academy committee	To be able to advise, for example, if board wrongly tries to delegate accountability
<b>Is an additional local governance tier needed?</b>	no	no	no	no	yes	yes	this is the local tier	To be able to advise and arrange meetings as appropriate
<b>Is a finance committee mandatory or optional?</b>	optional	optional	optional	optional	mandatory	mandatory	optional	To be able to advise and arrange meetings as appropriate
<b>Is an audit committee mandatory?</b>	no	no	no	mandatory in some cases	mandatory in some cases	mandatory in some cases	no	To be able to advise and arrange meetings as appropriate

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Is a standards committee mandatory or optional?	optional	optional	optional	optional	optional	optional	optional	To be able to advise eg. if board wants to create a new committee
Are all other committees optional?	yes	yes	yes	yes	yes	yes	yes	To be able to advise eg. if board wants to create a new committee
<b>ACTUAL POSITION</b>								
Where will I find the actual governance structure?	instrument of government, minutes, and terms of reference	instrument of government, minutes, and terms of reference	instrument of government, minutes, and terms of reference	articles of association and scheme of delegation	articles of association and scheme of delegation	articles of association and scheme of delegation	scheme of delegation and terms of reference	Need to understand for many reasons including which board/committee is delegated power and responsibility to take decisions as well as how they communicate and report. Also useful to see if structure is suitable.
Who decides if any optional committees are needed?	governing body	governing body	governing body	trust board	trust board	trust board	trust board or academy committee	To check the constitutional documents to see who has the authority to decide.

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Who appoints the chair?	governing body	governing body	governing body	trust board	trust board	trust board	trust board or academy committee	To check the constitutional documents to see who can appoint.
<b>FINANCE</b>								
Who signs off the budget?	governing body	governing body	governing body	trust board	trust board	trust board	trust board	To ensure the board meets its obligations
When does the budget need to be signed off by?	31 <sup>st</sup> March	31 <sup>st</sup> March	31 <sup>st</sup> March	May and July	May and July	May and July	May and July	To schedule meetings and plan agendas for board and any committee
Is a finance committee mandatory	no	no	no	yes	yes	yes	yes	To help ensure compliance and advise as to suitable committee structure
<b>OTHER DIFFERENCES</b>								
Who is the "admissions authority"?	LA	LA	LA	trust board	trust board	trust board	trust board	To ensure admissions is included on the annual cycle of governance business if appropriate and to assist with appeals panels if necessary

LA = Local authority

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## Differences between settings and their importance to clerks

VC = Voluntary controlled school

VA = Voluntary aided school

SOD = Scheme of delegation