**CLERKING DEVELOPMENT PLAN (CDP) – updated 19/03/19**

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| **Name:** | **XXX** | **Date Range:** | Jan 2018 to Dec 2018 |
| **Employer:** | XXX  | **Mentor:** | XXX |
| **Self-evaluation:*****Clerking Competency areas of strength*** | Competency 2 – administration* Experience as a clerk (in a different context) has helped me to hone my administration skills
* Confident in my ability to professionally clerk meetings, including setting agendas, preparing meeting papers and producing minutes

Competency 3 – advice and guidance* Experience as a clerk (in a different context) has helped me to understand the role of the Clerk and its importance
* Confident in my ability to provide appropriate advice and guidance or to know when/where to seek this

Competency 4 – people and relationships* As the majority of the people involved are already associated with the college, good working relationships are already in place
* Experience as a clerk (in a different context) means I am aware of the procedures/processes for filling vacancies, reviewing governance, maintaining effective communication, evaluating board skills etc
 | **Academies/ Schools Clerked:** | XXX |
| **Self-evaluation:*****Clerking Competencies for development*** | Competency 1 – understanding governance* I am very conscious I need to improve my understanding of the Academy/MAT sector overall and governance in that setting

Competency 2 * Administration would benefit from a proper schedule of business/forward plan as what was left for me was minimal

Competency 3 – advice and guidance* Improving understanding of governance in an academy/MAT setting would improve my ability to provide sound advice and guidance without having to check and/or seek external confirmation (and ultimately would improve my confidence)
 | **Self-evaluation:** ***Describe how you involved the boards you work with to inform your self-evaluation*** | Self-evaluation shared and agreed with Chair and Executive Headteacher prior to completion onlineWill involve the Chair in discussions on progress and planned development activity |
| **Objective**  | **Activities** | **Success criteria**  | **Monitoring evidence** | **Time scale** | **Evaluation** | **RAG** |
| Improve my knowledge of governance in the sector | Meet with local peers who clerk both the MAT and the sponsor college | Improved knowledge of Academy governanceImproved confidence in providing advice and guidanceMore effective use of time as queries can be answered quicklyEffective peer network in place | Update of self-evaluationFeedback from Chair, EHT, Board | By Dec 18 | I meet with a couple of clerks approx. two times per year |  |
| Attend training as identified | To Dec 18 | All five credits used, based on my development need |  |
| Set time aside for reading background material and MAT governance documents on a weekly basis | Weekly from June 18 | Has been difficult, not strictly adhered to. I make time when I need to (this role is undertaken as part of my substantive college clerking role) |  |
| Use and contribute to the Academy Clerks network (and support others) | As required | Have posted information and responded to queries. Have also joined and become an active member of a Clerks Facebook group |  |
| Use the Eversheds advisory service when needed and use the resources on their member area | As required | Used when required, e.g. model terms of reference |  |
| Sign up to and utilise the free trial of The Key for School Governors (and assess whether to request budget for full membership) | During June 2018 | Signed up, used and now a full member. Very well utilised by myself and the new HT |  |
| Shadow an experienced MAT Clerk | By Dec 18 | Not as yet. Happy to try this and would welcome suggestions |  |
| Improve the administration and organisation of board meetings | Put in place regular meetings between the Chair, Clerk and Executive HT | Meetings in placeApproval of risk register and forward plan | Notes from meetingUse of risk registerAgendas for 2018/19 | From June 18 | Has been difficult due to several changes in personnel and management but have initiated regular meetings with the Chair and new HT |  |
| Introduce a governance risk register | July 18 | Yes, introduced and presented at every meeting of the Finance & Audit Committee and regularly to the Board |  |
| Draft and implement a forward plan for 2018/19 (including researching examples) | July 18 | Implemented and largely adhered to, although there have been unexpected items  |  |
| Sign up to/utilise the free trial of The Key for School Governors (and assess whether to request budget for full membership) | June 2018 | Signed up, used and now a full member |  |
| **Development Activity** | **Date** | **Completed** | **Mentor Sessions** | **Time and Date arranged** |
| Governorspace training module – Finance for Clerks | 12/07/18 |  | General introduction, discussed potential training modules, shadowing and signing up to The Key  | 15/06/18, 11am |
| Governorspace training module – Understanding governance in academies | 19/07/18 | ✔ |  | 28/03/19, 11am |
| Governorspace training module – Clerking: Advice and guidance | 19/07/18 | ✔ |  |  |
| Governorspace training module – Statutory requirements for governors | 20/07/18 | ✔ |  |  |
| Governorspace training module – Writing effective minutes | 05/09/18 | ✔ |  |  |
| Governorspace training module – Clerking: Administration | 25/09/18 | ✔ |  |  |

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| **Impact on Clerking Knowledge and Skills** | **Impact on effective and efficient governance** |
| When I started Governorspace I had recently begun the role of clerk to a MAT (only containing one academy). I had 12 months’ experience of clerking within an FE college so was aware of the fundamentals of governance but needed the context to complete my knowledge.The introduction to The Key (which was mentioned by my first mentor) has had a massive impact on my own clerking skills – both in terms of building my own knowledge and also knowing where I can find a quick answer to a query.The online training sessions were really important and there have been many examples of where I have changed practice or introduced something as a result of undertaking that training – for example a governors’ code of conduct and ensuring all governors have signed to confirm they have read and understood the updated the Keeping Children Safe in Education document.I also felt the training confirmed my own understanding in many cases, which boosted my confidence and enabled me to be more assertive when giving advice and guidance to governors. | My improved knowledge and understanding of the academy context and governance within that context has had a considerable positive effect on the overall governance of the MAT.I am aware of the information that should be presented to them in order for them to undertake informed decision making. I have worked with the new HT to improve reporting.I am aware of the legal requirements and accountabilities, in particular the ‘musts’ and ‘shoulds’ of the Academies Financial Handbook and have taken corrective action where necessary.I have ensured the policies that should be in place/approved by the board are in place and are reviewed at the appropriate frequency. I have ensured there is a general scheme of delegation and a financial scheme too. I have introduced a code of conduct (using the NGA template) and have ensured the Chair now receives monthly financial reports.  |
| **Area/s for further development in the next cycle** |
| Focus on the remaining ‘Amber’ areas of the self-assessment:* Strategic priorities (the Academy is undergoing a complete review, including strategic priorities) so this will be easier once this is complete
* Values/ethos (as above)
* Reporting concerns externally (this will be confirmed and incorporated into a Clerk’s handbook/SOP document I will be writing)
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