

DAG Busy Governor's Guide to Clerk's Appraisal

1. The clerk to governors is a professional role and the person carrying out this role is entitled to an annual appraisal. In academies, the clerk to the board is now referred to as 'Governance Professional' (Academy Trust Handbook). Clerks employed by the school should be appraised by their employer, those clerks who are self-employed should be reviewed formally in the same way. The Chair should appraise the clerk and may wish to involve the headteacher or the vice chair. Dates for the appraisal and mid-year meeting should be agreed in advance.

2. Performance appraisal is a two-way process, it is about sharing expectations and measuring performance, ensuring clerks have the necessary skills, knowledge and support to develop their role to support the governing board to achieve its objectives.

3. The annual appraisal should review and evaluate the clerk's previous year's performance against objectives set the previous year, just as happens with other members of staff. It should be based on a self-assessment checklist or document completed in advance of the appraisal meeting by the clerk and the appraiser. Remember objectives should be SMART: Specific, measurable, achievable, relevant and time bound.

4. This appraisal should, as with all other appraisals lead to a pay recommendation. Many clerks do not have sufficient hours to carry out their role effectively and the appraisal process enables this to be discussed in detail.

5. An annual appraisal provides an opportunity for discussion of the clerk's role but should be based on their job description. Three key areas will be:

- **Skills, knowledge and performance** – identifying the clerk's knowledge and skills and their ability and desire to perform effectively
- **Legal advice and guidance** – identifying the clerk's ability to pro-actively ensure the governing board is operating legally whilst providing guidance and support
- **Administrative tasks** – identifying the clerk's ability and effectiveness in completing essential administrative tasks.

6. The appraisal process should also be an opportunity to celebrate things done well.

7. As with other staff, progress against the objectives set should be reviewed halfway through the year.

8. Some schools have used support staff appraisal processes to appraise the clerk, but tailored templates, toolkits and job descriptions are available to support governing boards to carry out this function. For those that subscribe, have a look at Clerk to Governors Appraisal Guidance and Toolkit at <https://devoneducationservices.co.uk/microsites/governance-consultancy/policies-documents-and-information-guides/paperwork-for-clerks/> and The Key

<https://schoolgovernors.thekeysupport.com/the-governing-body/roles-on-the-governing-body/clerk-to-the-governors/appraisal-of-the-clerk-to-governors/>

