

Effective clerking
Handout 1
Key competencies

| | Competency | Why it is important | Most/least challenging? |
|---|---------------------------------|---|-------------------------|
| 1 | Understanding governance | A sound understanding of the board's duties and responsibilities, governance legislation and procedures; and the wider context in which the board is operating will enable the clerk to make an important contribution to the effectiveness of the board. It will result in better quality advice on legal and procedural matters related to governance; make for more accurate recording of discussions and decisions; and enable more efficient use of the board's time. | |
| 2 | Administration | Professional clerking ensures that the processes and procedures of governance are administered efficiently. Taking care of the basics enables the chair and the board to make more effective use of their time and focus on strategic matters. Professional clerking involves developing a forward plan with the chair so that board members are well prepared for meetings and executive leaders are able to provide the right information for discussion. High-quality paperwork leads to better-informed decision-making, and clear record-keeping enables compliance and accurate reporting to others within, and outside, the organisation. | |
| 3 | Advice and guidance | Access to timely and accurate advice and guidance, or signposting to expert advice where appropriate, contributes to better and more efficient decision-making and helps the board to manage the risk of non-compliance with legal and regulatory frameworks. Appropriate advice and guidance reduces the risk the board gets drawn into or distracted by operational matters, helping it stay focused on its strategic functions. Professional clerking gains the confidence and respect of the board by being proactive in keeping knowledge current; is aware of relevant and reliable sources of information; and is clear about when to provide advice themselves and when to recommend external or specialist advice. | |
| 4 | People and relationships | Professional clerking plays an important role in ensuring that the board has accurate records of its people and their skills and can contribute to induction and training of new board members. In addition, professional clerking builds and maintains professional working relationships with the board which is the foundation for providing impartial advice and support. Good relationships are also essential to establishing open communication and ensuring smooth information flow between the board, the executive leaders and, where required, staff, parents and the local community. | |