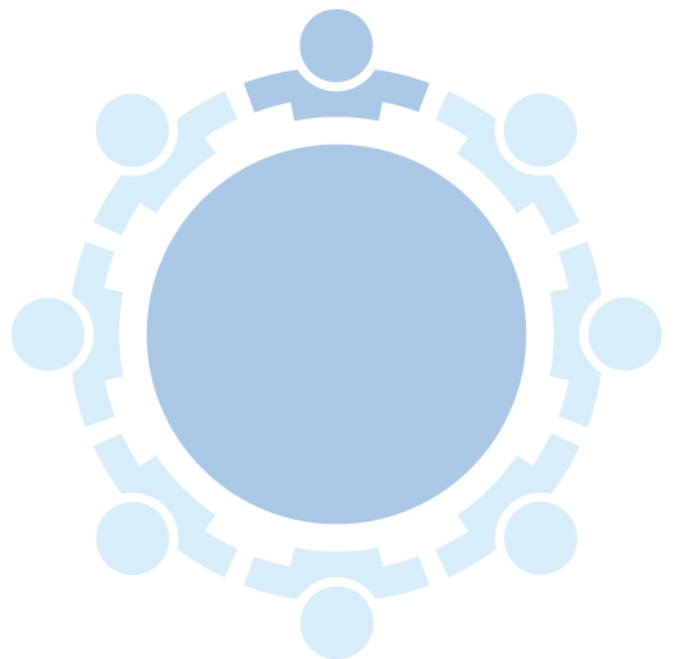


Putting a price on effective clerking

A report considering the pay and remuneration of clerks to governing boards across England.

National Governance Association

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Foreword

The role of clerk/governance professionals is key to the improvement of governance. There is no question that the workload of governors and trustees is made more manageable where a clerk/governance professional covers the full job description and is able to avail themselves of relevant CPD.

NGA launched Clerking Matters campaign with four main aims: to increase the understanding of the importance of the work of clerks and what can be expected of a well-trained clerk; help governing boards find good clerks where there is difficulty in doing this; to help clerks know where continuing professional development can be found, and to encourage appropriate remuneration of clerks.

The campaign has achieved some notable successes. It was influential in securing funding for the Clerks Development Programme and was the catalyst for NGA launching its “find us a clerk” service. The service provides a platform for governing boards to advertise their vacant clerks’ positions, and professional clerks their services so that boards can contact them directly.

There is still much work to do improve the status and profile of the clerking profession and in particular ensure that clerks/governance professionals are being paid at a level that is commensurate with the status of the role.

The valuable research we have carried out and is referred to in this report accepts that the varying nature of the clerk/governance professional role and governing structures does not lend itself to a uniform pay structure. However, it also highlights the fact that too many clerks/governance professionals are not being paid at an appropriate level, or even for the number of hours that they work. The research provides credible recommendations that point to a proportionate and reasonable rate of remuneration for those clerks completing the role as defined in the NGA model job description.

Acknowledgements

We would like to thank members of the advisory group NGA convened to support phase three of our research and test the robustness of our evaluation. Your commitment, professionalism and constructive candour made a huge difference to this research project.

Thanks also to members of the NGA team who worked on this research project and the resulting report.

NGA is a learning organisation and we are grateful to those colleagues from other sectors whose work we have drawn on when undertaking this research project.

1 Introduction

The role of clerk to the governing board requires extensive knowledge, experience, skill and training if it is to be carried out. The following “four discrete areas of activity for effective clerks” have been identified (Sassoon, 2008; James *et al.*, 2015; Department for Education [DfE], 2017; National Governance Association [NGA], 2018), with David Sassoon (2008):

- **Administration**, which includes “setting of meetings, planning agendas with the chair and headteacher, sending out agendas, keeping a register of attendance, providing advice at meetings, writing up and distributing minutes, taking appropriate action arising from the meetings and keeping an updated contact list of governors, trustees and members of academy committees (also referred to as local governing bodies)”. The clerk also needs to “be familiar with ... and operate within the legal framework”.
- **Providing information**, by “sift[ing] information and present[ing] it to governors in a digestible form”.
- **Providing advice**, including being “cognisant with the law”, “reading extensively and networking with groups like the NGA (sic).”, “on legally moot matters ... provide governors with options and evaluate each with a view to assisting governors”, and helping the governing board understand the difference between operational and strategic decisions.
- **Governor/ trustee development**, including interactions and advice to those governing which acts as “on the job training” as well as more formal training facilitated by the clerk.

Similar duties and responsibilities are outlined in NGA’s clerk’ job descriptions and DfE competency framework. In addition to Sassoon’s (2008) typology, the NGA model job descriptions also include reference to advising and managing governing board membership, as well as emphasising personal development (with the clerk needing to invest time in their own continuing professional development) and the importance of maintaining relationships between the board and executive leaders. James *et al.* (2015) also stresses that the clerk plays an important role in developing communication between the layers of governance and management, developing governance and promoting a “governance culture” in and beyond board meetings.

With the growth of academies in England, there are also additional responsibilities revolving around the statutory functions of the “company secretary”. NGA has produced two different job descriptions for maintained schools and academies to emphasise the subtle but important differences between the roles. Often, however, academy trusts employ a governance manager separate to clerks (sometimes called head of governance or similar), to carry out the company secretary functions. In particular, governance professionals in groups of schools (particularly multi-academy trusts) are distinct from clerks and are required to help those governing understand their place within often complex governance systems – including helping them understand schemes of delegation and the relationship between local governance and the board of trustees.

While there is a consensus in the literature around what the clerk should do, the role nonetheless differs significantly on the ground. The role of clerk can vary depending on what the school expects and the professional experience and expertise of the individuals themselves.

While many clerks across the country have received official accreditation from professional bodies¹, and are carrying out a role reflective of the *Clerking Competency Framework*, a 2016 survey carried out by NGA found that a quarter of clerks did not offer legal advice to their governing board. Furthermore, in some schools, the individual who takes the minutes will be referred to as the clerk, yet there will be no expectation that they will provide legal advice to the governing board. This is further complicated by the fact that some clerks in schools complete the role as an aside to their substantive position, with the clerk often employed in an administrative position within the school.

Given the discrepancy between the actual and theoretical role of the clerk, pay and remuneration has persisted as an issue in the education sector for a number of years. The 2016 survey conducted by NGA (see figure one), highlighted that, on average, clerks are paid £11.00 per hour, with maintained school clerks paid slightly less (£10.46 per hour) and academy clerks slightly more (£11.15 per hour). There is also a large amount of variation depending upon region – with clerks in the North West paid the least (£9.00 per hour) and those in London paid the most (£14.47 per hour). The survey also revealed variation in terms of the clerk’s contractual arrangements; with varied practice as to whether schools are adequately remunerating clerks for work that they do outside of board meetings.

Figure one: Table showing pay rate for clerks in 2016

	Median hourly rate	Median annual salary	Median fixed amount per meeting	Median fixed amount per meeting divided by time spent*
All respondents (n = 1458)	£11.00	£2,000	£131	£15.20
All maintained schools (n = 861)	£10.46	£1,500	£130	£15.00
All academies (n = 304)	£11.15	£3,350	£150	£15.50

Looking to address the above issues, NGA continues to run a *Clerking Matters* campaign to provide clarity around the role of the clerk and to cut through the huge variation across the sector in terms of the expectations of the role and pay. Here, NGA is committed to:

- increasing the understanding of what clerks do and what can be expected of well-trained clerks
- helping governing boards to find good clerks where there is difficulty doing this
- helping clerks identify professional development
- encouraging appropriate remuneration

¹ See, for example, the NGA’s *Leading Governance* clerks development programme: www.nga.org.uk/LeadingGovernance/Clerks.aspx.

Extensive work has already been completed by NGA on many aspects of this campaign, including the production of model job descriptions as well as an online service to allow governing boards to advertise clerking roles free of charge and for clerks to advertise their services to governing boards. The next phase of NGA's *Clerking Matters* campaign, and the purpose of this report, is to isolate what clerks should be paid in relation to the duties outlined in the NGA model job descriptions.

2 Theoretical framework

This research project aims to establish a robust and sustainable foundation in which to base clerks pay by answering the following question:

1. What would be considered fair remuneration for clerks based upon the NGA job description(s) and the current job market?

NGA considered using a number of methods to approach this question. These included carrying out a survey of clerks, similar to the one that NGA carried out in 2016, and a benchmarking exercise with other governance professional roles. It was decided, however, that a survey would reveal little more than it did in 2016. Furthermore, preliminary analysis of a range of current job advertisements revealed a wide range of salaries for governance professionals, from six figure salaries for company secretaries in large private companies to clerks of small charity trust boards appointed as volunteers. It is also challenging to draw comparisons between clerks in schools and governance professionals in other sectors as there are clear differences in the requirements for board administration.

In view of the above it was decided to approach the question using established "job evaluation" and "market pricing" methods (Armstrong and Baron, 1995; Durai, 2010). These methods are often used sequentially (IES, 2018) to determine where a specific role fits within an organisational hierarchy in terms of skills needed, responsibilities and accountability (internal validation) and how much a role should be paid in order to offer a competitive salary in comparison to the national labour market (external validation).

The job evaluation method is commonly used to provide the internal validation within an organisation. While only indirectly related to pay, job evaluation is used to compare different roles and justify the scale between the most and least paid. According to the Advisory, Conciliation and Arbitration Service (ACAS, 2014), the job evaluation process "facilitates the accommodation of new and revised jobs into the grading structure" and can also be "used by organisations as a basis for job matching and external pay comparisons". It is, however, important to note that the process of job evaluation is a "systematic process rather than a scientific one" (Suff and Reilly, 2006). When carried out by organisations, the job evaluation method is inherently subjective. While good practice dictates that it should be carried out by a varied advisory group (thus minimising the bias of any particular evaluator or interest group) there will no doubt be a degree of unconscious bias associated with ranking roles within an organisation.

There are a number of established frameworks under which job evaluations are carried out in the public sector. The National Joint Council Job Evaluation Scheme (NJC JES), the Greater London Provincial Council Job Evaluation Scheme (GLPC JES) and the Hay evaluation scheme have been widely used. Each of these schemes looks to rank varied job roles against several “factors”. These factors relate to the level of knowledge, skill and responsibility required to execute duties, as well as the demands and working conditions related to each role. Factors are given a weighted ranked point score and the higher the overall score the more challenging the role in terms of skills, knowledge, responsibility and/or demand.

The “market-pricing” method seeks to establish the particular “market value” for a position by comparing the role under review with others outside of an organisation. This method often relies upon survey data external to an organisation and does not involve comparing like-for-like roles directly. In the context of clerks’ to governing boards, a more suitable method involves the use of “occupational groups” that focus on job content, rather than job title alongside national survey data to determine how much a position is worth based on a comparison across the whole economy.

3 Methodology

1. Using the principles of job evaluation and market pricing outlined above, the research project was carried out in three distinct and concurrent phases: Gaining an accurate perception of clerks’ pay
2. Placing the role of clerk into an occupational category

A “job evaluation” of NGA’s model job descriptions for clerks to maintained school governing boards and single academy trusts based on an established framework. It was acknowledged that NGA did not have the specific context or the primary data that employers when carrying out job evaluations and market-pricing. Instead we relied upon secondary data from schools and local authorities with no guarantees as to consistency of application.

It was further acknowledged that applying a monetary value to worth is a subjective task; remuneration packages are subject to a number of micro-factors which depend upon the extent to which organisations value worth differently and how much they can afford to pay staff. This is pertinent to the role of clerk carried out in multifaceted governing arrangements that in turn generate different expectations and requirements.

The “job evaluation” carried out in phase three of the research project was modified to take into account the above whilst maintaining a level of robustness. It makes effective use of available resources to point to a proportionate and reasonable rate of remuneration for those clerks completing the role as defined in the NGA model job description.

3.1 Phase one: gaining an accurate perception of clerks pay

With the 2016 NGA clerks survey now a few years out of date, it was important to gain an accurate perception of both the levels of pay clerks currently receive and the duties attached to the levels of pay.

Between November and December 2019, NGA collated information from 110 nationally advertised job descriptions for clerk to the governing board in England. To supplement this data, NGA also harvested data from the 53 clerks' adverts hosted on NGA's website between 2017 and 2019. This was collated into a standardised excel spreadsheet. These two approaches generated data from 163 unique job adverts for the clerk.

Data was then manually inputted into an excel spreadsheet, which included details on:

- the job title as advertised
- the location of the role (broken down by local authority)
- the pay scale for each advertised role
- the employment type (i.e. whether the job was advertised as full time, part time or flexible)
- what essential skills and experiences employers were looking for
- the qualifications employers were looking for to carry out the role
- whether clerks were expected to provide legal/ procedural advice and/or administrative support

All data was cleaned and imported into the statistical software package SPSS. For ease of comparison, all pay data was converted into an hourly rate for comparative purposes. Pro-rata salaries were converted to an hourly rate equivalent using online tools.² Where salaries were listed as full-time equivalent, or pay was on a per meeting basis, hourly rate was calculated by dividing the time by the number of meetings per year and hours per meeting listed in the job advertisement. Where this information was not available, the clerk's time per meeting was assumed to be 9.1 hours (in line with the average reported in NGA's 2016 Clerks Survey).

Once all the data was cleaned and transformed, descriptive statistics were generated to explore whether clerks pay differed by region, school type and phase. Further analysis was carried out to explore the difference in pay between those employed to give advice as opposed to those employed to carry out administrative duties only.

3.2 Phase two: placing the role of clerk into an occupational category

Looking to use an adapted "market-rate" approach, the second phase was to ascertain where the role of clerk might sit in regard to the wider UK economy. The aim of this was to provide a broad range for clerks pay to ensure that the final phase, which involved a job evaluation exercise, was grounded within reality.

As discussed on page 4, comparing what clerks across other sectors are paid in relation to school clerks would yield little success. This is because the role of the "governance professional" differs significantly from industry to industry. Instead, NGA used data from the 2017 *Annual Population Survey* (APS). This includes data from 320,000 respondents and is representative of the UK population.

² See: thesalarycalculator.co.uk.

Rather than listing respondents' individual jobs in the survey, participants who took part had their jobs grouped using the Standard Occupation Classification (SOC) hierarchy produced by the Office for National Statistics (ONS). The different groups included in this hierarchy are:

- Managers, directors and senior officials
- Professional occupations
- Associate professional and technical occupations
- Administrative and secretarial occupations
- Skilled trades occupations
- Caring, leisure and other service occupations
- Sales and customer service occupations
- Process, plant and machine operatives
- Elementary occupations

Across each of these 'major groups' are several minor-groups and, through them, are listed sub-components of the minor groups. Detailed descriptors of each category can be found on the ONS website. Other variables included in the APS included years in occupation (which can be used as a proxy for experience), region and level of qualification.

Using NGA's job descriptions, the descriptors for the "major" and "minor" job groups were used to isolate the group(s) which best related to the role of clerk. From this, it was possible to ascertain and compare the pay of jobs in the groups where clerks would likely fit, looking across different regions and levels of experience to provide further insight.

3.3 Phase three: "job evaluation" of NGA's model job description

The final phase of the research project involved the use of an established "job evaluation" framework to ascertain how much clerks are financially worth based on skills, knowledge, responsibilities and the demands of the role. NGA chose the National Joint Council (NJC) Job Evaluation Scheme (JES) as this has previously been used by local authorities to establish pay for support staff in maintained schools. As a result, there is a wealth of information on using these schemes for school support roles to aid the evaluation of the clerk's role. NGA used several resources to carry out this phase of the project:

- (1) NGA's model job descriptions and the *Clerking Competency Framework*. To make these documents compatible with the job evaluation exercise, both job descriptions were converted into a single matrix detailing the skills, knowledge, responsibilities and demands associated with the clerk's role.
- (2) The NJC JES guidance, found in LGA's "Green Book". This document is split into thirteen separate factors used to impartially judge any role. The factors cover the knowledge needed to carry out a role, the mental and emotional demands, and the financial and physical responsibilities.

Each factor within the JES is scored from a level one up to a level five, six or eight. A score of one for a specific factor reflects very little or no relevance to the role whereas the higher the score the higher the demand, responsibility, knowledge or skill required. Detailed descriptors and guidance are provided as part of the JES to help those completing the evaluation understand the various nuances of each factor.

- (3) The final resource used was 59 model role profiles for school support staff published by LGA, eight of which were deemed by NGA staff to be particularly relevant to the level of skill, knowledge and responsibility needed to carry out the clerk's role. These eight roles were organised into three groups; three administrative roles (Administrator 2, 3 and 4), three finance roles (Finance 2, 3 and 4) and two business management roles (Business Manager 1 and 2). Within each group, the higher the number the greater the responsibility, knowledge and/or demands of the role. The NJC has completed the job evaluation for each of these role profiles and agreed a point score.

An advisory group was convened by NGA to help quality assure the "job evaluation" process and test the robustness of the conclusions reached. The advisory group had sector wide experience and included three clerking professionals, one senior member of NGA staff, an academic, two representatives of clerking organisations and a human resources professional. At a day-long meeting in January, the advisory group were asked to:

- to discuss and debate NGA's job descriptions and ensure that advisory group members are familiar and happy with the content of the clerk's role as the basis for completing the desktop pay exercise
- to look across the eight model role profiles selected by NGA and to isolate which role best relates to the clerk; not looking at the content of each role but rather the level of skill, knowledge and responsibility required
- to convert the NGA job descriptions into a role profile matrix for the clerk, adopting the same language to that used in the fourteen model profiles
- to use the NJC JES and accompanying guidance to carry out a factor-by-factor review of the clerk's role to facilitate a discussion and debate around the skills, knowledge, responsibilities and demands of the role

Following the meeting NGA staff spent further time examining the NJC JES guidance and a detailed follow-up paper was issued to the advisory group for comment, with rationales for score alterations where applicable. Comments were received from three members of the advisory group and have been incorporated within this report.

While a factor-by-factor review was conducted as part of this study, it was decided that it would be unhelpful to publish a "points score" for the role of clerk as most readers will be unfamiliar with the guidance. Furthermore, as job evaluations are associated with equal pay legislation, and each local authority will apply the evaluation framework differently, NGA felt ethically obliged to keep the points scores produced as part of this study confidential.

Instead, the primary aim of this phase was to determine which model profile the clerk was benchmarked against and to provide a commentary of the discussion provoked by the NJC JES guidance to justify this decision. To demonstrate how this translates into pay, NGA then identified 19 published advertisements of roles in schools which matched the benchmarked role profile. NGA also obtained data from five anonymised LAs that had matched their pay scale to the NJC JES points score. This offered an indication of remuneration for the benchmarked model profile as well as remuneration based on the points score from the factor-by-factor review of the clerk’s role carried out by the advisory group and NGA.

4 Analysis

This section details the evidence from across the methodological strands outlined above, with phases one and two used to support the pay recommendation made in phase three.

4.1 Phase one: gaining an accurate perception of clerks pay

Looking across the 163 clerking job advertisements, the mean average wage stood at £12.19 per hour. The distribution of pay across all of the data is outlined in figure one, which demonstrates that the modal pay (rounded to the nearest pound) stood at £12 per hour, with over half (54.0%) of clerks being paid between £10 and £12 per hour.

Figure one: Graph showing the advertised remuneration for 163 clerking roles, broken down into percentage brackets and rounded to the nearest pound.

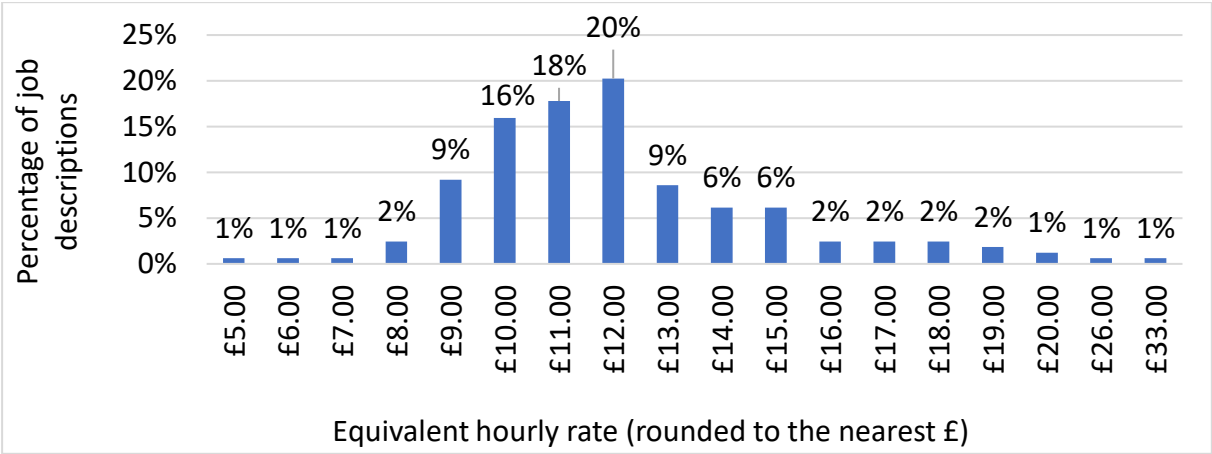


Figure two shows the various ways in which schools were paying clerks. The majority offered a salary or pro-rata salary and, on paper, paid slightly more than those offering an hourly sum.

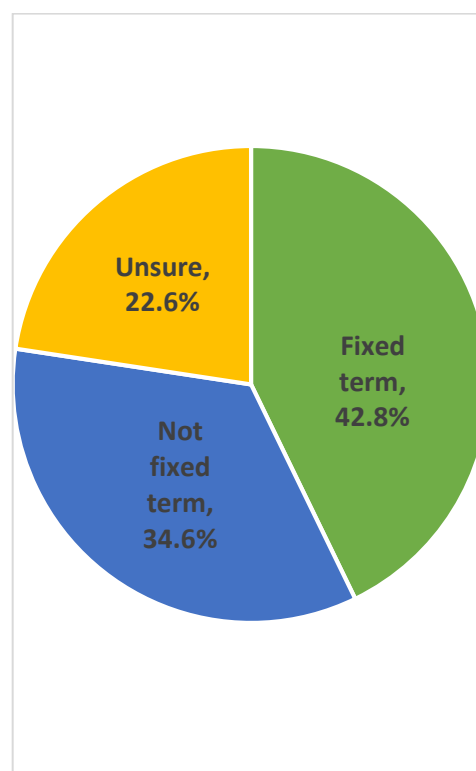
It is important to note that this data does not, however, account for unpaid hours. Although limited, analysis of the job advertisements showed that employers allocated an average of 7.3 hours per meeting, 31.6 hours per month and 115 hours per annum for clerking duties. While it is important to note that this data is likely skewed by those employed to clerk multiple boards, the range across these statistics is significant (from 4.5 hours – 13.84 hours per meeting, 6 – 148 hours per month and 30 to 350 hours per annum). While there was no way to confirm this, there was little indication that salaried clerks would be paid for extra hours worked.

Exploring clerks' contractual arrangements in more detail, figure three also indicates that many clerking roles were advertised as fixed-term contracts.

Figure two (left): Table showing the number and percentage of clerks paid by the hour, a yearly salary, per meeting or other.

Figure two (right): Pie-chart showing the percentage of clerks who reported being on fixed-term contracts.

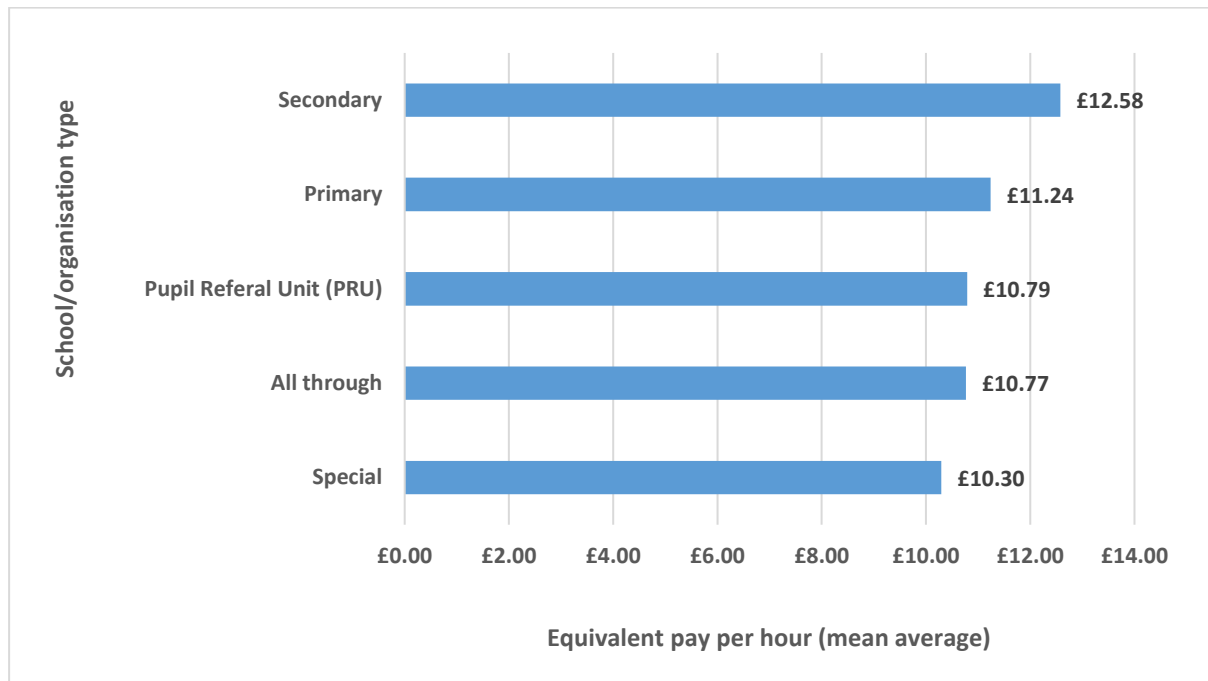
Salary type	Count	Percentage	Average equivalent hourly rate
Hourly	72	44.2%	£11.73
Salary	85	52.1%	£12.63
Other (termly, day rate or contract fee)	2	1.2%	£6.41
Per meeting	4	2.5%	£13.93
Total	163		



Breaking down pay in more detail, there is some variation depending on the job description outlined in the clerk's advertisement and the organisation type looking to employ the clerk. For instance, looking specifically at academy appointments, the 11 academy committee clerks that were included in the sample were paid an average of £13.26 per hour. In contrast, the 17 individuals labelled as "trust wide" clerks were paid an average of £14.80 per hour. This may, however, reflect differences in the role between academy committee and trust wide governance professionals, with the later often transcending into governance manager type positions – particularly in multi-academy trusts (see page 4).

Exploring this in more detail, academies paid the most for clerks compared to other school structures; with single academy trusts offering a mean average of £13.58 per hour and MATs offering a mean average of £12.36 per hour. Local authority-maintained schools offered the least, at a mean average of £11.46 per hour. Part of this may be explained by the fact that there are a higher proportion of secondary than primary school academies, with figure four showing that secondary schools paid slightly more for their clerk than their primary counterparts. It may also be the case that, regionally, there are more academies in London than elsewhere in the country (see figure five) and therefore pay may be better due to cost of living allowance in the capital.

Figure four: Pay for clerks broken down by the phase of school they were employed to work within, as specified in job advert.



The data also shows further differences between regions in terms of clerks pay. Looking at figure five, the data shows that those in London are paid significantly more than clerks in other parts of the country. While understandable based on cost of living, this does impact upon the average pay of clerks. When excluding London from the data, the mean average wage for clerks falls to £11.50 per hour. This is compared to London only, where clerks are paid an average of £16.70 per hour. When looking at figure five, please note that there was only one case from the North East (£9.75 per hour) and three cases from the North West (£9.32 per hour on average) and this is why these regions have been excluded from the graph.

Figure five: Pay for clerks broken down by the region they were employed to work within (excluding North West and North East), as specified in job advert.



Finally, data was collected on qualifications across 125 applications. The largest proportion of advertisements did not specify that clerks needed any qualifications (44.5%) whereas several others outlined that on the job training would be provided. Of those that did specify qualifications, 12.8% specifically mentioned GCSEs and 4.9% mentioned a specific clerking qualification. Not a single advertisement asked for a degree. Figure six demonstrates how qualifications were broken down by pay across advertisements.

Exploring experience across 120 advertisements, 12.8% directly asked that the applicant have clerking or clerical experience, and 17.1% wanted an individual experienced in minute taking. In addition, 25.6% required applicants to have experience in administration and 4.3% asked for some form of governance knowledge. Figure seven demonstrates how experience was broken down by pay across advertisements.

Figure six: Pay broken down by the type of qualification requested in 125 clerking advertisements.

	Number of advertisements	Percentage	Average hourly rate
<i>GCSEs</i>	21	12.8%	£12.83
<i>Clerking</i>	8	4.9%	£12.95
<i>Other</i>	9	5.5%	£10.29
<i>Training provided</i>	13	7.9%	£13.70
<i>None</i>	73	44.5%	£11.96
<i>Data not collected</i>	39	23.8%	-

Figure seven: Pay broken down by the type of experience requested in 120 clerking advertisements.

	Number of advertisements ³	Percentage	Average hourly rate
<i>Administration</i>	42	25.6%	£11.93
<i>Clerking</i>	21	12.8%	£12.33
<i>Governance knowledge</i>	7	4.3%	£12.97
<i>Minute taking</i>	28	17.1%	£11.53
<i>Record keeping</i>	4	2.4%	£11.87
<i>IT</i>	24	14.6%	£12.65
<i>Other</i>	51	31.1%	£12.55
<i>None</i>	23	14.0%	£11.33
<i>Data not collected</i>	44	26.8%	-

Across this data, those advertisements not requesting any qualifications paid, on average, £11.92 per hour and those advertisements asking for no experience paid, on average, £11.33 per hour. Those asking for some level of experience were advertised at £12.23 per hour on average, whereas advertisements asking for at least one qualification were offered at, on average, £12.25 per hour.

4.1.1 Do those that give advice get paid more?

As part of this phase, NGA also wanted to explore whether those who gave technical advice were paid more than those who conducted purely administrative tasks. Of the job profiles analysed, 73% mentioned that the role of clerk involved providing some form of procedural or constitutional advice.

³ Some advertisements asked for more than one element of essential experience, hence why the total count is higher than 164.

This does not mean, however, that the other clerking roles did not involve an advice element – 38 job adverts provided very little information on the nature of the responsibilities or provided vague details which made it difficult to ascertain whether providing advice was part of the role. Of all of the advertisements, 26.4% either explicitly mentioned that advice was not needed or did not include it alongside an adequately detailed list of other duties.

The data demonstrates that, in those advertisements where giving advice was explicitly mentioned, clerks were paid £12.55 per hour compared to those who did not give advice who were paid a mean average of £11.76 per hour. This figure excludes the 20.0% of advertisements where it was unclear whether the clerk gave advice. These roles were paid at a rate of £11.57 per hour on average.

4.1.2 Summary

The data above show that clerking roles are being advertised across the country at a mean average of £12.19 per hour. There are some caveats to this figure, however, as the data raises question marks over whether those who are paid a salary are appropriately remunerated for all of the hours they work. Furthermore, there are key differences based on the type of role clerks are asked to carry out (i.e. whether clerks are expected to provide advice or not) as well as difference by region, phase of school and structure. Beyond pay, the data also suggests that, of those advertisements which requested qualifications, the most common request was for GCSE or equivalent level with some (roughly a quarter) explicitly requesting clerical or administrative experience.

When deciding upon an appropriate salary, this data is used to explore the theoretical impact of the proposed salary figure on the current job market for clerks, ensure that any recommendations are credible and provide an indication of the number of clerks whose current pay falls below the recommended amount.

4.2 Phase two: placing the role of clerk into an occupational category

Two groups were identified from the Standard Occupation Classification (SOC) categories contained in the *Annual Population Survey* as being relevant to the role of clerk based on NGA's job descriptions. In terms of the clerk's administrative duties, the closest match was deemed to be "secretarial and related occupations". This group includes medical secretaries, legal secretaries, school secretaries, unqualified company secretaries, personal assistants and other secretaries, receptionists, typists and related keyboard occupations. This category includes job holders involved in "arranging meetings, circulating agendas and other meeting documents, attending meetings, and taking and preparing minutes" and therefore covers a major part of the clerk's role.

The “secretarial and related occupations” category nonetheless underplays the technical aspects of the school clerk’s role; namely, providing advice to the governing board and offering expert knowledge and technical support in terms of governance practice. While these job duties are harder to place, the role of the “governance officer” and “qualified company secretary” (individuals expected to provide a similar level of technical advice) falls under the “business, research and administrative professionals not elsewhere classified (N.E.C)” category. Many of the tasks associated with this category are not applicable to clerks, including controlling and/or administering budgets.

However, other responsibilities listed under this category which relate to the clerks role include advising “on the interpretation and implementation of policy decisions, Acts and regulations”, “provide[ing] technical assistance in the formulation of policy” and assisting in recruitment (of governors and trustees).”

4.2.1 Difference in experience, qualifications and pay

Comparing these two categories shows that there is a clear difference in terms of the experience and qualifications needed to carry out jobs in these groups which, ultimately, affects pay. Below is a brief description of pay across the two groups, broken down by qualification, experience, industry and region. Secretarial and related occupations roles

Most respondents operating within the “secretarial and related occupations” category had at least GCSE grades A*-C or equivalent (87.4%) with 25.8% having A level or equivalent as their highest qualification. Only 16.8% had a degree or equivalent as their highest qualification whereas only 3.3% of respondents in this category had no qualification at all.

Those included in this group earned, on average, £11.61 per hour across the United Kingdom. As would be expected, pay varied depending on how long an employee had spent in role – with those with 20 or more years’ experience earning, on average, £13.23 per hour compared to those with less than three months experience earning an average of £9.85 per hour. Similarly, individuals with higher qualifications earned more. Those with a degree (or equivalent) earned £13.88 per hour compared to those with no qualification earning £9.80 per hour. There was little difference between those with GCSEs A*-C (or equivalent) and A levels (or equivalent) as their highest qualifications and hourly pay, with both groups earning £11.34 and £11.97 per hour respectively.

Pay for administrative and secretarial roles also varied by region and industry. Those employed in secretarial or related occupations in London, for instance, earned the highest amount on average at £15.35 per hour. At the other end of the scale, those in Yorkshire and Humber earned an average of £10.08 per hour.

Looking at pay by industry, those working within public administration (education and health) earned £10.40 per hour on average – the second lowest out of nine subgroups.

4.2.1.1 Business, research and administrative professionals N.E.C

Requiring specialist knowledge, 66.3% of respondents in the Business, research and administrative professionals N.E.C category held a degree or equivalent as their highest qualification, with a further 8.2% having undertaken some form of higher education. Only 13.8% respondents in this category had an A level or equivalent as their highest qualification and 7.8% had GCSEs or equivalent as their highest qualification. Less than 1.0% had no qualification at all.

When factoring experience into the analysis, the data shows that three quarters (74.8%) of respondents with less than two years of experience had a degree or equivalent, with a decrease in the prevalence of those with degrees only occurring for those with significant experience. Nevertheless, even for those who had worked for between 10 and 20 years in this profession, over 60% had a degree or higher. This suggests that this occupational group is primarily made up of individuals with degrees or equivalent professional experience.

On average, those employed within these roles earned £23.60 per hour across the United Kingdom. Again, experience and qualifications made a difference to how much these individuals earned. Those with less than three months experience received, on average, £21.00 per hour compared to those with 20 or more years' experience who earned an average of £24.50 per hour. Of those with their highest qualification being GCSE or equivalent, the average wage was £20.13 per hour with those with A-level or equivalent experience earning an average of £20.95 per hour. Those with a degree or equivalent qualification earned £24.87 per hour.

Again, there was also significant regional variation in earnings - with those in Yorkshire and Humberside earning £20.00 per hour compared to those in London on £28.00 per hour. In addition, similarly to "secretarial and related occupation" roles, those working within public administration (education or health) had comparatively low earnings, picking up an average of £20.61 per hour.

4.2.2 Comparison and summary

The differences between the two occupational groups are significant – with those operating within business, research and administrative professional N.E.C roles in the public administration (education or health) sector earning an additional £10.21 per hour, on average, compared to those in secretarial or related occupations across the UK.

In relation to the clerk, the data suggests that a degree or equivalent is a prerequisite to most of the business, research and administrative professional N.E.C roles whereas this is not the case for the secretarial and related occupations category. Nevertheless, the business, research and administrative professional category captures the advice element of the clerk's role more appropriately. A summary of the differences between the two categories is captured in figure eight.

Figure eight: Comparison of key differences between the role of clerk and Administrative and secretarial/ Business, research and administrative professional SOC-NOS categories.

	Secretarial and related occupations	Business, research and administrative professionals
Salary (public admin: education and health)	Average: £10.40 per hour. Within one standard deviation: £5.52 per hour- £15.30 per hour.	Average: £20.61 per hour Within one standard deviation: £11.81 per hour- £29.40 per hour.
Modal highest qualification	GCSE grades A*- C or equivalent.	Degree or equivalent.
How category relates to the role of clerk	Category descriptor includes reference to: <i>“Arranging meetings, circulating agendas and other meeting documents, attending meetings, and taking and preparing minutes”.</i>	Category descriptor includes reference to: <i>Advising “on the interpretation and implements of policy decisions, acts and regulations”.</i> <i>“provide[ing] technical assistance in the formulation of policy”.</i>
How category differs to the role of clerk	Does not recognise clerks as experts and advisers.	Includes reference, for some roles, to controlling and/or administering budgets.

In determining clerks pay, this data will be used in conjunction with the data in phase one to determine whether the proposed pay figure is realistic in relation to the wider UK economy.

4.3 Phase three: Using job evaluation tools to explore clerks pay

Finally, this section offers an overview of phase three, taking account of the limitations outlined on pages 4-5. This section covers: a commentary of the desktop exercise carried out by the advisory group aligning the role of clerk to one of the eight model profiles; the agreed skills, knowledge, responsibilities and demands matrix for the role of clerk; and a detailed analysis of how the role of clerk relates to the matched role profile based on the national joint council (NJC) job evaluation scheme (JES). A brief summary of how this translates into pay for the clerk is also included on pages 29-31.

4.3.1 Discussion around NGA job descriptions and eight model profiles

The first activity of the advisory group was to agree the content of the NGA maintained and academy clerk job descriptions and to ensure that all members could buy-in to the content of the clerk's role as described in those documents. Some slight changes were suggested, particularly around the clerk's relationship to "ensuring that statutory policies are in place" and the clerk's status as "company secretary" in academies. Overall, however, the advisory group agreed that the NGA model job descriptions adequately captured the core role of the clerk but did not include some of the additional responsibilities other governance professionals might cover.

While NGA will update the clerks job descriptions to capture some of the changes suggested, it was agreed that the recommended edits did not alter the skills and knowledge needed to carry out the role of clerk, nor change the demands of the role. Therefore, it was agreed to continue with the evaluation exercise based on what was written in the job descriptions.

Following the job description review, the group carried out a desktop exercise looking to align the role of clerk to the knowledge, skills, responsibilities and demands of the eight "school support staff role profiles". After completing the exercise, the advisory group identified three roles from the model profiles which they believed most closely aligned with the role of clerk. Three advisory group members selected Administrator 3, four selected Administrator 4, and one selected Business Manager 2. An explanation of what these roles might look like in schools can be found in appendix one. Details on the knowledge, skills, demands and responsibilities required for the role are outlined in appendix two. [N.B. the appendices are essential reading to make sense of the discussion in this section].

Justifying the rationale for aligning the role of Business Manager 2, one advisory group member outlined their experience of observing clerks as members of the senior management team – particularly within a further education setting. However, as this went beyond the NGA job description, it was suggested that this was not related to the core requirements of the role. Instead, the group consensus was that the role of clerk, as outlined in the NGA job description, best aligned with Administrator 4 in regard to the level of skill and knowledge needed to carry out the role and the responsibilities and demands associated with the post. The group considered and debated the fact that the clerk has a unique relationship with the board and exercises a form of steer which requires greater responsibility than suggested for Administrator 3. Furthermore, reference to additional "experience" was also key to swaying the group toward aligning the role of clerk to Administrator 4; with the clerk needing to acquire bespoke knowledge and in order to provide advice to the board.

Once the advisory group had come to the consensus that Administrator 4 represents the best alignment for the clerk's role, the advisory group then agreed a "matrix" of the skills, responsibilities and demands of the clerks role, looking to fit the language of the model profiles to NGA's job descriptions and *Clerking Competency Framework*. The agreed matrix can be found in appendix three. [N.B. this is also essential reading to make sense of the discussion in this section].

4.3.2 Alignment and debate of individual factors

Looking to further pinpoint the role of the clerk, the advisory group then compared the new matrix (appendix three) to the National Joint Council (NJC) - Job Evaluation Scheme (JES), looking at each factor individually.

As outlined on pages 5-6, publishing the advisory groups points score would be unhelpful and potentially unethical. As such, the below discussion goes through the NJC-JES guidance factor by factor, demonstrating where the advisory group, and subsequently NGA through a follow-up and revision exercise, felt the role of clerk fitted in relation to the proposed matched role profiles; Administrator 3, Administrator 4 and Business Manager 2.

4.3.2.1 Job factor one: Knowledge

The clerk requires greater knowledge than Administrator 3	The clerk requires equal knowledge to Administrator 4	The clerk requires less knowledge than Business Manager 2
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The NJC JES is clear that, to be awarded a higher score than Administrator 3 for knowledge, and the same score as Administrator 4 and Business Manager 2, the job holder “require[s] ... knowledge of all the available practices and procedures for the particular area”. This certainly applies to the role of clerk who requires a detailed and full understanding of governance.

Both the advisory group and NGA agreed that the role of clerk goes beyond Administrator 3. However, to be at the same level as Business Manager 2, the guidance states that it is necessary to have “theoretical knowledge” which “includes knowledge of relevant concepts and principles, including, where relevant, detailed knowledge of legislation and statutory guidance, in order to be able to apply it to own work area”. The consensus amongst advisory group members was that this was the appropriate level for the role of clerk.

During the follow-up and revision exercise NGA questioned whether, to fulfil the minimum requirements of the job description, it was truly necessary for the clerk to have detailed knowledge of legislation and statutory guidance, or whether “detailed knowledge of how tasks need to be undertaken or situations managed across a specialist area ... in order to give advice” was enough for the clerk to complete their duties.

Distinguishing between these two concepts ([a] understanding the procedure for how something is done and [b] applying legislation to practice) was key to deciding whether knowledge was to be awarded at the same level as Administrator 4 or Business Manager 2. The *Clerking Competency Framework* states that it is important that clerks have “a sound understanding of the board’s duties and responsibilities; governance legislation and procedures; and the wider context in which the board is operating.” NGA would not expect clerks to be interpreting complex legislation, rather, working within the procedures set out in legislation and accompanying advice and guidance. If complex legal questions arise, NGA expects clerks to seek advice and this is similarly outlined in the *Clerking Competency Framework*. Based on this, NGA’s rationale for revising the knowledge score was that the understanding of procedure was enough for the clerk to exercise their advisory duties effectively.

NGA also referred to additional guidance notes in the NJC-JES which drew parallels between knowledge and the level of qualification required. We took the view that the qualification descriptor for Administrator 4 which defined the role as “NVQ Level 4 equivalent”, was a better fit than the qualification descriptor for Business Manager 2, which referred to “graduate Level” experience or qualifications. This view was based largely on the NGA clerk development programme being at NVQ Level 3, and the advertisements reviewed in phase one of the research project, none of which state a degree level qualification or equivalent as a requirement of the role.

Whilst this view was supported by some members of the advisory group it was by no means unanimous. One member said in their feedback: “that none of the advertisements reviewed requires degree level qualifications or equivalent demonstrates the lack of understanding of the nature of the clerk’s role by those advertising”.

4.3.2.2 Job factor: Mental skills

The clerk requires greater mental skills than Administrator Level 3	The clerk requires greater mental skills than Administrator Level 4	The clerk requires fewer mental skills than Business Manager 2
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For Administrative 3 and 4 (which gave the same score for mental skills), the guidance states that the “job requires analytical and judgement or creative and development skills, where there is a need to interpret information or situations and to solve varied problems or develop solutions or plans over the short term”. Both the advisory group and NGA agreed that the role of clerk went beyond this due to the reference to “complex information” as opposed to simply “information” at the level above Administrative 3 and 4. This is relevant as the complexity of information clerks are expected to understand and process is mentioned in the agreed matrix.

Going beyond this, the advisory group also felt that the information that the clerk was required to process was deemed to be ‘varied *and* complex’. Based on this, and the NJC JES guidance, they therefore felt that the role of clerk should be at the same level as Business Manager 2. Based on the follow-up and revision exercise, NGA did not, however, consider the role to be at this level. The NJC JES guidance states that a job at this level “requires analytical and judgement or creative and development skills to analyse and interpret varied and complex information or situations and to produce solutions or strategies over the long term”.

The key wording in this phrase was “long-term” which was defined in the guidance as “more than a year”. While several members of the advisory group noted that building effective governance is a long-term ambition, NGA questioned the extent to which a clerk should be considered the instigator/innovator of the structures and processes through which governance takes place, as well as their involvement in forward planning activities. The *Competency Framework for Governance* is clear that the design/development of governing structures and processes that are fit for purpose and appropriate to the scale and complexity of the organisation is the responsibility of the governing board. It goes on to state that everyone on the governing board should be able to contribute toward this.

While the *Clerking Competency Framework* does state that the clerk “may also involve designing structures and procedures for the sound governance of the organisation” it outlines that this is “particularly [the case] in larger and more complex organisations”. NGA argues that this applies more to governance managers in larger trusts. While the clerk uses their knowledge of governance to contribute to the board’s design/development of governing structures and processes, this is owned by the governing board and not the clerk.

The guidance for this level also states that, to be at the same level as Business Manager 2, the clerk must demonstrate innovation in performing their duties. Based on our interpretation of the *Clerking Competency Framework* and *Governance Competency Framework*, NGA took the view that this was not central to the clerk’s role.

4.3.2.3 Job factor: Interpersonal and communication skills

The clerk requires equal skill in this area to Administrator Level 3	The clerk requires equal skills in this area to Administrator 4	The clerk requires less skills in this area to Business Manager 2
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The guidance for Administrator 3 states that the job holder must “exercise advisory, guidance, negotiating or persuasive skills”. For Administrator 4, the guidance adds that these skills should be used “to encourage others to adopt a particular course of action”. At Business Manager 2 level, the job holder must have ““highly developed” advisory skills and “convince others to adopt courses of action they might not otherwise wish to take”. Business Manager 2 level also refers to exchanging “orally and in writing complex and contentious information with a range of audiences, including non-specialists”.

The consensus amongst the advisory group was that the role of clerk should be placed at the same level as Business Manager 2, based particularly on the reference to “non- specialists” above. However, NGA’s view was that stating advisory skills as needing to be “highly developed” as opposed to “developed”, went beyond the minimum requirements of the clerk’s role, therefore it was more appropriate for the role of clerk to be placed at the same level as Administrator 4. This view is supported by the *Clerking Competency Framework*, which states that clerks will sometimes be required to “access *specialist* third party advice and guidance, including legal advice”. Furthermore, NGA could not think of an example when the information conveyed by a clerk would be particularly contentious as specified above for this level.

Amongst the other reasons for placing the role of the clerk at the level of Administrator 4 is the requirement that it places on the clerk to “encourage others” and convey information that is sometimes “sensitive” or “complex”.

In their feedback one advisory group member disagreed with NGA that the role of clerk should be placed at the same level as Administrator 4 stating: “it is a core element of the role of the clerk to provide direct influence to the board on all relevant regulations and statutory duties ... This will require effective written and oral communication skills and will include delivering explanations to a broad range of governance knowledge and skills in place on any given board – including those entirely new to governance”.

4.3.2.4 Job factor: Physical skills

The clerk requires greater physical skills than Administrator 3	The clerk requires greater physical skills than Administrator 4	The clerk requires fewer physical skills than Business Manager 2
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The advisory group placed the role of clerk at the same level as Administrator 3 and NGA agreed with this. For both Administrator 3 and 4, the guidance states that “the work requires dexterity, co-ordination or sensory skills, where there is either: (a) some demand for both precision and speed: or: (b) considerable demand for precision, in the use of these skills”. The advisory group raised questions over the definition of “sensory skills” and what this means in practice. For example, does it include the ability to read the room and develop a complex understanding of the people in it? Responding to these suggestions, the advisory group felt that these abilities were not physical, but rather intellectual or emotional.

The demands in this area for “precision and speed” were also felt to be “some” (Administrator 3 and 4 level) rather than “considerable” (Business Manager 2 level). However, it was felt that, because precision and speed applied to board meetings, and that use of these skills did not constitute the whole role, this does not apply to the clerk.

Beyond this, the advisory group also considered guidance which talked about “specialist” keyboard skills for roles rated above Administrator 3 and 4. It was decided that the keyboard skills needed were not “specialist” and therefore did not apply to the clerk’s role.

4.3.2.5 Job factor: Initiative and independence

The clerk exercises greater initiative and independence than Administrator 3	The clerk exercises equal initiative and independence to Administrator 4	The clerk exercises less initiative and independence than Business Manager 2
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The advisory group placed the role of clerk at the same level as Administrator 4 and NGA agreed with this.

Both Administrator 3 and 4 levels refer to “working within recognised procedures”. However, I for Administrator 4 refers to management of own workload, which is something that the advisory group felt was applicable to the clerk.

The factor guidance also refers to having access to a supervisor or manager. Administrator 4 allows for the jobholder to respond, “independently to unexpected problems and situations” and to have “access to a supervisor/ manager for advice and guidance on unusual or difficult problems”. For Business Manager 2, the guidance talks about “responding independently to unanticipated problems and situations” as well as having “access to a supervisor/ manager for advice and guidance on serious problems”.

The clerk’s relationship with a supervisor/manager was put forward as a reason for placing the role of clerk at the same level as Business Manager 2. However, the consensus amongst the advisory group was that the clerk’s relationship with the chair does not involve the advice on policy and resource issues” attributed to the level of Business Manager 2.

Other statements in the guidance at Business Manager 2 level related to “organising the workload of a team” or “allocating and re-allocating project and response work amongst a team”. This did not seem to apply to the clerk and, instead, the “working within recognised procedures” description at Administrator 4 level was felt to be a more appropriate and accurate description.

4.3.2.6 Job factor: Physical demands

The role is as physically demanding for the clerk as it is for Administrator 3	The role is as physically demanding for the clerk as it is for Administrator 4	The role is as physically demanding for the clerk as it is for Business Manager 2
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The advisory group placed the physical demands of the role of clerk at level 1 and NGA agreed with this. Central to this assessment was the description in the JES guidance of post holders at this level operating “mainly in a sedentary position”.

4.3.2.7 Job factor: Mental demands

The role is as mentally demanding for the clerk as it is for Administrator 3	The role is less mentally demanding for the clerk as it is for Administrator 4	The role is less mentally demanding for the clerk as it is for Business Manager 2
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The advisory group placed the role of clerk at the same level as Administrator 4. To meet this requirement, the JES guidance states that the role requires either “lengthy periods of enhanced mental attention”, “lengthy periods of enhanced mental attention”, “medium periods of concentrated mental attention”, or “considerable levels of work-related pressure”.

NGA’s view was that the role of clerk should be placed at the same level as Administrator 3, which requires “medium periods of concentrated sensory attention”, “medium periods of enhanced mental attention” “short periods of concentrated mental attention”, or “considerable levels of work-related pressure”.

An important element in this factor are the definitions of short (minutes up to an hour), medium (one to two hours), lengthy (periods of more than two hours at a time) and prolonged (the whole working day, or close to) periods of time. The advisory group discussed timespans at length, giving careful consideration to the length of board meetings. With best practice stating that board meetings should last no more than 2 hours, the advisory group was unanimous in its agreement that this was a question of “medium periods” (periods of between one and two hours).

All advisory group members agreed that the clerk exercised medium periods of “concentrated sensory attention”, which “occurs when the jobholder needs to be particularly alert” and includes “typing” and “word processing”. However, the key to determining whether the role was at the same level as Administrator 3 or higher came down to whether the clerk met the criteria of undertaking “medium periods of concentrated mental attention” when completing their duties.

The advisory group discussed in detail the perceived difference between “concentrated” and “enhanced” mental attention. On the one hand, the JES guidance states that “enhanced mental attention” covered “checking of documents for completeness or correctness ... [and] ... carrying out occasional calculations”, whereas “concentrated” mental attention consisted of “repeated manual calculations, data analysis or other work with figures; or ordering of facts, as for instance, in report writing or preparation of a presentation”.

The advisory group felt that the mental attention required by the clerk during governance meetings was “concentrated” for medium periods and therefore warranted the higher score. NGA’s view was based on the rationale that clerks would only be expected to exercise concentrated mental excretion for brief periods. In other words, any “concentrated mental attention” (including interpreting figures etc.) may occur in a governing board meeting but would be sporadic and only happen in short-term episodes.

Feedback received from some members of the advisory group disagreed with NGA’s view that the role of clerk should be placed at the same level as Administrator 3. One advisory group member said that while “sporadic ... [the concentration required for the role] is still a very significant aspect”. Another advisory group member said that concentrated mental effort for the clerk also occurs outside of meetings “during the interpretation of meeting contributions to ensure their accurate presentation in draft minutes. These skills also need to be applied in informing board members of changes in the regulatory framework and explaining these clearly and concisely to board members”. Whilst acknowledging these points NGA maintains that the required amount of concentrated mental effort was enough to stretch beyond the short term other than in exceptional circumstances for the clerk.

4.3.2.8 Job factor: Emotional demands

The role is as emotionally demanding for the clerk as it is for Administrator 3	The role is as emotionally demanding for the clerk as it is for Administrator 4	The role is as emotionally demanding for the clerk as it is for Business Manager 2
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The advisory group placed the emotional demands of the role of clerk at level 1 and NGA agreed with this. Whilst some elements of the clerk’s role can expose them to emotionally demanding situations (e.g. exclusion panels), this was not included in the agreed job matrix and was additional to the central component of the clerk’s role. It was also acknowledged that normal board functions can be emotionally demanding, but that this is rare. Consensus was therefore reached on the basis of emotional demands being minimal, in the same way they are for Administrator 3, Administrator 4 and Business Manager 2.

4.3.2.9 Job Factor: Responsibility – For people well-being

The clerk has more responsibly for people – wellbeing than Administrator 3	The clerk has more responsibly for people – wellbeing than Administrator 4	The clerk has the same level of responsibly for people – wellbeing as Business Manager 2
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The advisory group placed the emotional demands of the role of clerk at level 1, the lowest level for this factor on the basis that the clerk has very limited contact with groups in a school in a way that would impact upon their wellbeing.

NGA were in initial agreement with the advisory group however further scrutiny was warranted using the assessment tool that forms part of the guidance, which allows the reviewer to consider the “hands-off” responsibilities of the job holder. This includes any advice given by a jobholder which has an indirect impact upon the well-being of a specific group. Time constraints meant that the advisory group were unable to make full use of the assessment tool.

This tool asks reviewers to:

(1) Identify whether the role has a significant advice or policy element.

For the role of clerk, this is clearly applicable.

(2) To rank the appropriate Level for this advisory/policy responsibility.

Using this assessment tool, NGA determined that the role of clerk “involves ... providing interpretation, advice and guidance on the operation and implementation of external regulations and statutory requirements. This includes adaptation of internal policies and procedures to meet operational demands”. This was the same level as Business Manager 2.

(3) To determine what responsibility (either for people, finance, or information management) this advice specifically relates to (for instance, a business manager offering financial advice would fall under “financial responsibility” whereas a HR professional offering recruitment advice would fall under “responsibility for people”).

The guidance is clear that reviewers should try to choose one responsibility factor in which the assessment tool specifically relates. NGA concluded that:

- the advice was not financial in nature and therefore did not fall under the financial responsibility;
- while the clerk plays a substantial role in information management, the advice given to the board is not related to how the board or clerk manages information;
- the advice is most related to board practice and effective governance – with the clerk looking to ensure that all decisions made by the governing board are legally sound.

In this sense, the clerk has substantial responsibility for the “hands-off” developmental wellbeing of the governing board and the educational wellbeing of pupils in the school.

(4) To adjust the score to reflect the “hand-off” responsibility that giving advice and/or policy recommendations bring.

As a consequence of the above NGA took the view that the emotional demands of the role of clerk should be placed at the level of Business Manager 2.

When consulted, not all advisory group members agreed with this view. One commented that “[aligning the role of clerk to Business Manager 2] makes me very uneasy. Claiming the clerk has a direct impact on the wellbeing of children and young people is tenuous, I think, but equally their impact, in my view, on the wellbeing of board members is extremely limited. If the argument is that they impact on the “well-being” of the board as a whole, in terms of whether it functions harmoniously, then there may be more of a case, but that’s not how the descriptors are written”.

While agreeing with the sentiment of this comment, NGA’s understanding of the guidance tool is that the role does not have to align with the descriptors outlined under the relevant factor, but rather that the descriptors under the advisory tool take precedence when applicable.

4.3.2.10 Job factor: Responsibility – For Supervision

The clerk is as responsible for supervision as Administrator 3	[Depending on the role requirements] the clerk is as responsible for supervision as Administrator 4	The clerk is less responsible for supervision as Business Manager 2
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The advisory group placed the clerk’s responsibility for supervision at level 1 the lowest level for this factor on the basis that they have “limited, or no, direct responsibility for the supervision, direction or co-ordination of other employees”. The NGA job description, however, clearly states that the clerk plays a role in “contribute[ing] to the coordination of effective learning and development opportunities for those involved in governance, including induction and continuing professional development”.

The rationale for not placing it a higher level was that the clerk does not actually deliver governor training themselves and plays a more limited signposting role.

NGA placed the clerk’s responsibility for supervision at level 2 on the basis that the guidance states that “the job involves some direct responsibility for the supervision, coordination or training of other employees. The work regularly involves advising, instructing, checking work, or training other employees”.

4.3.2.11 Job factor: Responsibility – For Finance

The clerk has equal responsibility for finances as Administrator 3	The clerk has less responsibility for finances as Administrator 3	The clerk has less responsibility for finances than Business Manager 2
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Given that the clerk does not handle money, the advisory group placed the clerk’s responsibility for finance at level 1 the lowest level for this factor. NGA agreed with this.

4.3.2.12 Job factor: Responsibility – For Physical Information

The clerk has greater responsibility for physical information & resources than Administrator 3	The clerk has greater responsibility for physical information & resources than Administrator 4	The clerk has equal responsibility for physical information & resources as Business Manager 2
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The advisory group placed the role of clerk at the same level as Administrator 3 based on the understanding that the *“work involves ... handling and processing of considerable amounts of manual or computerised information, where care, accuracy, confidentiality and security are important”*.

NGA’s view was that the role of clerk should be placed at the same level as Administrator 4 on the basis that the clerk plays a key role in developing an information system, which allows them to store and retrieve minutes of meetings, or other governing board documents, over long periods of time. The role therefore goes beyond processing data and this was explicitly referred to in the agreed job description matrix used by the advisory group.

Whilst this view was supported by some members of the advisory group it was by no means unanimous. Some members of the advisory group said that it *“hugely exaggerate[ed] the clerks’ role”*, and the *“reality [is that] clerks will be using systems that someone else has developed such as the school’s own google docs system or something like GovernorHub or Trust Governor”*. NGA noted this but maintains that as it is the clerks’ prerogative to choose an appropriate information system, then they have ownership of than they would simply using a pre-developed system.

4.3.2.13 Job factor: Working conditions

The working conditions are the same for the clerk as they are for Administrator 3	The working conditions are the same for the clerk as they are for Administrator 4	The working conditions are the same for the clerk as they are for Business Manager 2
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The advisory group placed the working conditions of at level 1 and NGA agreed with this.

4.3.3 Implications for pay

The above reflects both the nuances of the clerk’s role and the NJC JES guidance. It is particularly illuminating that each individual member of the advisory group, as well as the wider NGA team, had different ideas as to the level of skill, knowledge and responsibility required to be a clerk. As outlined elsewhere in this report, it demonstrates that job evaluation is a subjective endeavour.

Nonetheless, the further analysis conducted by NGA supports the overall conclusion of the advisory group that the clerk’s role best fitted the job role of Administrator 4 as it is described in the National Joint Council (NJC) - Job Evaluation Scheme (JES). In comparison to the clerk, there are eight matched factors for Administrator 4 as opposed to seven matches for Administrator 3 and five matches for Business Manager 2.

Encouragingly, the split between the clerk and Administrator 4 is relatively balanced, with the clerk scoring less than Administrator 4 for two factors but scoring more for three others. It is worth noting that, for six factors, the role of clerk exceeded that of Administrator 3 and is equal on every other factor. This suggesting that the role of clerk goes beyond the skills and experience of Administrator 3. The data also shows that the role of clerk is less demanding, and requires less skills and experience, than Business Manager 2; with the Business Manager 2 role exceeding the skills, responsibilities and experience on seven factors.

NGA identified the following three methods that employers might use to determine an appropriate level of pay for the job role taking into account organisational hierarchy.

(1) To “benchmark” the role of clerk to administrator 4 and determine how much these positions are being advertised at nationally;

As outlined in appendix one, Administrator 4 manages “the administrative and/or finance function within a school” and therefore broadly reflects the role of a school Office Manager. NGA identified 19 national job advertisements for Office Manager in schools which matched the job profile of Administrator 4. Of these, eight were identified as working in primary schools, one in nursery and two in secondary schools. The other advertisements did not specify phase. There was a broad mix of advertisements across the country, with four of the advertisements for roles in London. Looking at pay across each of these 19 advertisements, salaries were advertised on a scale between £12.75 per hour (min) and £14.79 per hour (max) on average. Excluding London, salaries were advertised on a scale between £12.14 per hour (min) and £14.28 per hour (max) on average.

(2) aligning the role of clerk and administrator 4 and using published LA pay scales to determine pay.

As outlined in appendix two, the job evaluation score for Administrator 4 ranges from 426 – 478 (depending on the specifics of the role). Although it is important to note that comparing this score to local authority pay scales does not account for local conventions and different ways of approaching the NJC JES, NGA nonetheless mapped the job evaluation points score for Administrator 4 (see appendix two) against five local authorities (none of which were in London) who had aligned the NJC JES job evaluation score with their pay scale.⁴ Taking the mid-point of the Administrator 4 job evaluation points score (452) figure nine shows which salary band the role would fall within across the five local authorities.

⁴ The local authorities used have been anonymised because the local authorities did not publish this data for this purpose. Four of these local authorities published their data for 1 April 2019 and one for 1 April 2018. However, all have been adjusted for pay inflation based on the published salary scales from the NJC.

Figure nine: How much five local authorities would pay Administrator 4 based on the points score outlined in the LGA model profile.

Local Authority	Bottom of the band	Top of the band
Local Authority A	12.60	13.99
Local Authority B	13.11	14.92
Local Authority C	14.46	15.81
Local Authority D	11.64	14.92
Local Authority E	12.11	13.11

Mean Average	£12.78	£14.55
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In summary, the data shows that, for Administrator 4, average pay across the five local authorities emerged at between £12.78 per hour (min) and £14.55 per hour (max).

(5) Using the anonymized NGA revised points score for the role of clerk and comparing this to publish LA pay scales.

NGA also compared its own anonymised job evaluation score for the role of clerk against the five local authority scales to offer an indication of clerks pay (see figure ten). Again, it is important to note that this does not account for local conventions. It also does not account for the fact that those completing the factor-by-factor review were not equipped with the same resources and training as others responsible for job evaluation.

Figure ten: How much five local authorities would pay the clerk based on the anonymised NJC JES points score determined by NGA and an advisory group.

Local Authority	Bottom of the band	Top of the band
Local Authority A	£12.60	£13.99
Local Authority B	£15.36	£17.04
Local Authority C	£14.46	£15.81
Local Authority D	£13.64	£17.04
Local Authority E	£12.11	£13.11

Mean Average	£13.63	£15.40
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Taking this approach, average pay emerged at between £13.63 per hour (min) and £15.40 per hour (max) based on an average of the lowest and highest points in the relevant pay bands across the five local authorities.

4.3.4 Summary

Looking at an average across all three approaches used above, the analysis suggests that clerks might expect to receive anywhere between £12.19 per hour and £13.63 per hour at the bottom end of the pay scale and £14.28 per hour to £15.40 per hour at the top end of the scale (depending which approach above is used). Taking a mean average across the three approaches would suggest that clerks exercising the functions outlined in the NGA job descriptions would expect to be paid between £12.85 per hour and £14.74 per hour.

5 Discussion and recommendations

Looking to draw together the above analysis, the research project set out to answer the following research question:

1. What would be considered fair remuneration for clerks based upon the NGA job description(s) and the current job market?

Three different methodological strands were used to ascertain how much clerks are being paid now, how much clerks might expect to be paid compared to the wider UK economy and what clerks might expect to pick up based on a job evaluation exercise comparing the role of clerk to other support staff roles in schools.

Based on this data, NGA conclude that, for clerks completing the duties as outlined in the NGA job descriptions for academies and maintained schools, the following recommendations should apply:

Recommendation one

While role content is very different, the school office manager is the closest match to the clerk in terms of responsibility, skill and knowledge. Just as the office manager would expect greater remuneration than other administrative staff, there is a degree of complexity and responsibility to the role of clerk which is often overlooked and means that they should be paid more than school administrators.

NGA has been clear throughout this project that employers are best placed to conduct their own job evaluations and determine appropriate remuneration based on affordability and local conventions.

However, phase three of this research demonstrates that the role of clerk is best matched to the highest-level administrative officer in a school (i.e. the Office Manager) and that the skills, responsibilities and demands of the role are more significant than other less senior administrative positions. The evidence is therefore clear that the clerk should not be treated as a mid-level administrative post when it comes to determining pay.

Of concern, of the 163 job advertisements explored in part one, 60.7% were proposing to pay the clerk less than the bottom of the pay band for the 19 Office Manager positions identified in phase three (£12.14 per hour). Perhaps even more alarmingly (particularly as this data is over two years old and has not been adjusted for inflation), 28.2% of advertisements were proposing to pay less than the £10.40 per hour average for UK public administrators outlined as part of phase two (see pages 16-19).

NGA thinks that clerks should be paid more than an administrative officer in their organisation and, where appropriate, they should be paid at a similar level to the office manager.

Recommendation two

Individuals who have the skills and knowledge to complete the role of clerk as defined in the NGA job descriptions, but who lack direct experience and/or qualifications, should be paid no less than £12.85 per hour or £24,799 per annum full time equivalent. This should be appropriately uplifted for roles advertised in London.

Of course, “benchmarking” the role of clerk to Office Manager may not always be possible nor practical. For example, small schools may not have an Office Manager and larger organisations (such as MATs) may have back office functions which are removed from individual schools. Taking account of the above data, NGA would expect schools to pay their clerk no less than £12.85 per hour. This figure is based on a detailed analysis of the skills, responsibilities, knowledge and demands of the clerk’s role (see pages 11-32).

Justifying this figure further, the analysis on pages 5-6 identified that the average wage of secretarial and related staff working in the public sector was £10.40 per hour in 2017. Even when adjusted for wage inflation (to c. £10.94 per hour) the proposed remuneration for clerks equals an additional £3,627 per annum on top of this figure. Furthermore, the proposed salary also falls within one standard deviation of the business, administration and other professional category (even when adjusted for inflation - £12.08 per hour) reflecting the fact that, while the clerk does not fall within this category, there is some overlap in terms of roles and responsibilities.

The proposed remuneration amount is also proportionate based on the analysis conducted in phase one. The average wage for clerks across the UK (phase one) emerged as £12.19 per hour. In this sense, an uplift of £0.61, on average, represents a realistic and proportionate increase across the sector as a whole. Yet advertisements not requesting any qualifications (average of £11.92 per hour) would see a recommended uplift of £1,555 full time equivalent (FTE) per annum. Furthermore, those advertisements asking for no experience (average of £11.33 per hour) would see a recommended uplift of £2,705.50 FTE per annum (see figures five and six on pages 12-13). Perhaps more significantly, there would also be a gross uplift of £4,485.00 FTE per annum as a minimum for the 29.4% of roles advertised at £10.50 per hour or less.

Recommendation three

When requiring an experienced clerk to fulfil the role as outlined in the NGA job descriptions (i.e. with national accreditation, clerical experience and/or governance knowledge) schools should pay no less than £13.80 per hour or £26,910 per annum full time equivalent. This should be appropriately uplifted for roles advertised in London.

Just like in any role, clerks with qualifications and experience would not expect to be paid at the lowest point in a salary bracket.

The figure given in recommendation three represents the mean average of the mid-point on the salary scale determined in phase three of this project (see page 16). Overall, 79.8% of advertisements in phase one were offered below this threshold. When adjusting for qualifications and experience (see figures five and six on pages 12-13), those advertisements asking for experience were advertised at £12.23 per hour on average, whereas advertisements asking for at least one qualification were offered at, on average, £12.25 per hour. Based on our recommendation, those advertisements requiring qualifications would be required to increase their remuneration of clerks by £3,022.50 FTE per annum and those asking for experience by £3,061.50 FTE per annum on average.

Of course, those clerks with significant experience might expect to receive more as they take on additional responsibilities and/or gain further experience, with the proposed top end of the salary bracket coming out at £14.74 per hour (or £28,743 per annum FTE).

Recommendation four

Employers should ensure that the contractual arrangements for their clerk are fair. Unless employed to complete clerking on a full-time basis (i.e. across multiple schools), clerks should be paid by the hour. An hourly rate of pay would also be appropriate for those clerks whose services are engaged directly, with boards being invoiced periodically. This is to take account of the fact that a clerk's hours are not fixed. Finally, all clerks should have an annual appraisal and pay review meeting in line with other employees.

One option would be to pay clerks for 9.1 hours per meeting as this was identified as the average time spent by clerks per meeting in the NGA Clerks Survey (2016). However, as the number of hours clerks spend carrying out their role vary and to reflect that their role is not confined to meetings alone boards should allow clerks to claim remuneration based on a self-assessment of hours worked. This will help ensure that clerks receive a fair amount of remuneration for the hours they complete.

A meaningful process of appraisal that is linked to pay progression is fundamental towards ensuring that clerks are paid at a fair rate, which matches the level of responsibility, skill and knowledge required and the number of hours worked. NGA believes that the appraisal process should involve the Chair of the governing board even if the clerk's services are engaged from a third party.

Recommendation five

While employers should take the lead in setting appropriate remuneration for clerking posts, it is important that clerks feel confident enough to have discussions with their employers about what an appropriate salary looks like. Clerks should also think carefully about applying for posts which advertise below an acceptable rate.

We want to be clear, that although we have included pay ranges, we are not saying that clerks cannot be paid above this. The aim of this research is to put forward recommendations based on NGA's job descriptions and so there will be circumstances where a higher rate of pay is justified.

While employers have an ethical (and, in some cases, legal) responsibility to pay their employees appropriately and proportionately, an important element of the job market is supply and demand. If there is a surplus of individuals willing to offer their significant skill set for less, this will push wages for clerks down. If employers struggle to recruit clerks for less than the minimum salary recommendation proposed in this report, this will encourage employers to offer more.

Those employing clerks and remunerating them at a rate that is lower than referred to in recommendations two and three should question whether this is commensurate with the level of professional support that they require and should expect to receive. Equally those clerks currently being remunerated at a rate that is lower than referred to in recommendations two and three should question whether their contribution, knowledge and skills are being recognised.

6 Resources Used

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Appendix one: Table explaining the job content of the roles selected by the advisory group as potential matches with the role of clerk (for illustrative purposes only)

Role	Job Description
Administrator 3	This individual would be a senior member of the administrative team, “providing administrative and organisational services to the school under the management of the senior leadership team”. They would have experience of development, management and operation of administrative systems and be, amongst other things, responsible for stakeholder liaison, analyzing data, running reports, organising meetings and taking notes, and allocating/ distributing work to more junior administrative colleagues.
Administrator 4	This individual would fulfil the office manager role in a school, heading up the administrative (and potentially financial) functions of the organisation. They would be expected to amongst other things, “plan, develop, organise and monitor support systems and procedures” as well as “provide support, advice and guidance on administrative function to senior staff” and those governing. The role also includes data analysis and interpretation, operating “bespoke school information systems” and completing/ submitting forms, including for outside agencies. Depending on the size of the school, the role may also involve line management, financial and/ or HR functions.
Business Manager 2	This individual would plan, develop and deliver support functions within a larger school or a cluster of schools. They would be a member of the senior leadership team and would, amongst other things, be involved in the line management of support staff, managing business, finances and school support functions, negotiating contracts and other financial agreements on behalf of the school, bidding for funding.

Appendix two: table outlining the knowledge, skills, responsibilities and demands of Administrator 3, Administrator 4 and Business Manager 2 roles as outlined in the LGA model role profiles.

Factor	Administrator 3	Administrator 4	Business Manager 2
Knowledge	<p>Implementation of a range of procedures, including ICT and systems knowledge.</p> <p>Level 3 NVQ equivalent.</p>	<p>Development, management and knowledge of a range of procedures, including ICT and systems knowledge.</p> <p>Acquired through experience. Level 4 NVQ equivalent.</p>	<p>Specialist knowledge of the range of theory and practice in several areas gained from extensive experience and expertise.</p> <p>Equivalent to level 5 qualification or Diploma.</p>
Mental skill	<p>Carries out a variety of tasks within set frameworks; requires creative skills for e.g. developing ... procedures. Analytical skills for monitoring and analysis of information and data.</p>	<p>Same as Administrator 3, with amendment to analytical skills, including interpreting data and complex information.</p>	<p>Skills for business and financial planning, interpretation, and development of procedures. Involving complex issues and situations.</p>

Interpersonal and Communication Skills	Communicates with internal and external stakeholders and deals with a range of issues.	Same as Administrator 3.	Advises, leads and negotiates on behalf of the school. Requires highly developed communication skills to deal with a range of issues.
		Reference to a wider range of internal contacts (including governors) and the requirement to respond to “difficult issues”. Skills also required for contract negotiation, management and motivation.	
Physical Skills	Reference to “keyboard skills with precision and speed”.	Same as Administrator 3.	Standard keyboard skills, without reference to precision and speed.
Initiative & independence	Works within clear guidelines.	Makes decisions where there is no clear process, requiring independent response. Also involves management of service.	Member of the senior leadership team. Makes independent decisions in relation to development and operational delivery of support services.
Physical Demands	Requires normal physical effort, with a mixture of sitting, walking and carrying minor loads.	Same as Administrator 3.	Same as Administrator 3.

Mental Demands	Concentration required with work regularly interrupted.	Same as Administrator 3, but with reference to concentration for “complex tasks”. Also refers to deadlines as well as interruptions.	Requires lengthy periods of concentration for meetings, reports and analysis; Management work might be interrupted, and priorities switched.
Emotional Demands	Exposure to emotionally demanding situations is infrequent.	Same as Administrator 3.	Same as Administrator 3.
Responsibility for People Wellbeing	Face-to-face contact with a range of stakeholders, with some welfare responsibilities for care of sick pupils.	Same as Administrator 3.	Working with other senior managers, ensures compliance with policy, statute and national guidelines regarding support and staff functions for the benefit of pupils.
Responsibility for Supervision	Regular day-to-day allocation of work to others. Occasional supervisory responsibilities.	May demonstrate duties to less experienced staff	Line management responsibility in a large school.
		Regular day-to-day allocation of work to others.	Line management responsibility in a cluster of schools.
		Line management responsibilities.	

Responsibility for Financial Resources	May handle small amounts of cash.	Regular cash handling for small expenditures.	Business and financial management of resources
	Regularly handles small amounts of cash.	Manages and monitors budgets	For large schools/clusters, responsible for financial policies
Responsibility for Physical, and Information Resources	Responsible for the maintenance and updating of records and systems.	Advisory responsibilities for administrative services including planning, developing and mentoring support systems and procedures. Also develops and maintains recording and information systems.	Responsibility for physical information and resources across a large school/ multiple schools. Overall responsibility for ordering equipment, services and supplies.
Working Conditions	Office environment.	Same as Administrator 3.	Same as Administrator 3.
Job evaluation score	357 - 370	426 - 478	599-625

Appendix three table outlining the agreed matrix for comparing the role of the clerk to other support roles in schools, using the NJC-JES as a guide.

Role title	
Clerk to the Governing Board	
Purpose of the role (job statement)	
To provide guidance, advice and effective administration to support the governing board of a school and its committees.	
Responsibilities	
<p>Key duties:</p> <ul style="list-style-type: none"> • Provide advice to the governing body on governance, constitutional and procedural matters. • Provide effective administrative support to the governing body and its committees. • Ensure the governing body is properly constituted. • Manage information effectively in accordance with legal requirements. • Develop and maintain effective professional working relationships with those governing and executive leaders and contribute to the coordination of effective learning and development opportunities for those involved in governance. • Keep up to date with current educational developments and legislation affecting school governance and undertake regular CPD as appropriate • Conduct skills audits and advise on training requirements Perform such other tasks as may be determined by the governing board from time to time 	
Indicative knowledge, skills and experience	
<ul style="list-style-type: none"> • Experience and skills to effectively administer official meetings. • Knowledge of governance, constitutional and procedural process and practices equivalent to current national qualifications level 3. 	
Factor	Relevant Job Information
Knowledge	<p>Provide advice to the board on its core functions, legislation and procedural matters, regulatory frameworks, best practice, the annual calendar and succession planning.</p> <p>Knowledge for implementing a wide range of procedures sufficient to prepare focused agendas and draft minutes professionally.</p> <p>Possess advance literacy skills and has competent IT skills.</p> <p>[Equivalent to at least national qualifications level 3].</p>
Mental skills	Carries out a variety of tasks within set frameworks and, where required, develops tasks. Uses judgment to interpret and provide steer on a range of complex governance and legal issues, situations and problems.



Interpersonal and Communication Skills	Has the ability to effectively communicate, both verbally and in writing with the chair, governing board, headteacher and other members of staff, as appropriate. This includes providing advice where required and facilitating and supporting effective relationships. Engaging with third party organisations (e.g. National Governance Association).
Physical skills	Precise keyboard skills and professional notetaking required.
Initiative & Independence	Confidence, discretion and initiative to provide advice to the governing board, knows where and how to seek external support, keeps own knowledge up-to-date. Draws matters to the chair's attention where required and proposes recommendations. Independent management of own workload.
Physical demands	Requires normal physical effort, with some need to sit in a constrained position to write notes during board meetings.
Mental demands	Concentration required throughout governing board meetings and other areas of the role. Must meet tight deadlines and be responsive.
Emotional demands	Exposure to difficult or emotionally demanding situations is infrequent.
Responsibility for People Wellbeing	Direct contact is generally incidental to the main job duties, <i>but indirect responsibility for developmental and educational wellbeing of governing board and pupils through advice.</i> ⁵
Responsibility for Supervision	Assist the chair in contributing to the coordination of effective learning and development opportunities for those involved in governance, including induction and continuing professional development. Influence and aid the board to make effective decisions.
Responsibility for Financial Resources	No financial responsibilities.
Responsibility for Physical and Information Resources	Development and maintenance of a wide range of records and information systems with regard to appropriate levels of information security in line with legal requirements. Must be able to maintain confidentiality.
Working conditions	Work is normally carried out in a business environment and may require some home working.

⁵ Following the advisory group discussion, one change was made (italicised) to the matrix in the "responsibility - for people wellbeing" box reflecting the use of the advisory tool in the NJC-JES guidance (see pages 23-25 for more details).



National Governance Association

The National Governance Association (NGA) is the membership organisation for governors, trustees and clerks of state schools in England.

We are an independent, not-for-profit charity that aims to improve the educational standards and wellbeing of young people by increasing the effectiveness of governing boards and promoting high standards. We are expert leaders in school governance, providing information, advice and guidance, professional development and e-learning.

We represent the views of governors, trustees and clerks at a national level and work closely with, and lobby, UK government and educational bodies.

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