

CLERK'S: Church School Governance Microsite Crib Sheet

Introduction

This Crib sheet is to help you as the Clerk at the school to be as self-supporting as possible.

We are hopeful that this updated Crib sheet will answer many of your questions.

As the clerk to governors for your school, you will be issued with a username and password by the SDBE to access your live Church School Governance Microsite.

For any queries, please e-mail marion.bagshaw@salisbury.anglican.org

The Clerk's microsite is a 'live' website and will capture changes to the appointment process. This will show where each application is in the process.

The microsite is automated and as the application progresses all emails are sent to the appropriate role by using this system. Emails are not sent out by SDBE. SDBE can access the system and forward emails sent.

Please ensure all information added on the system especially for Foundation Governors is correct, especially with email addresses.

All emails will come from a non SDBE address – nominations@systemserve.co.uk

Microsite Page example

Your school page will look similar to the following: - **(This is a test school)**

ABC test school Alter who's Chair/Vice Chair

Chair: Governor History
Vice-chair: vacant Current Governor Terms

Your board of governors is shown below, please use the links on the right to renew, replace, or fill these roles.

Foundation Governor	vacant	Fill this vacancy
Ex Officio Foundation Governor	vacant	
Staff Governor (Chair)	vacant	Fill this vacancy
Parent Governor	vacant	Fill this vacancy
Parent Governor	vacant	Fill this vacancy
Co-opted Governor	vacant	Fill this vacancy
United Reform Church Partnership Governor	vacant	Fill this vacancy

Key to icons

- Ⓢ Parent/Carer
- ✚ Communicant - C of E
- Ⓢ C of E - Non-Communicant (don't attend church regularly/ or communion)
- ✚ Regular worshipper (at non C of E, 'Churches Together' church)
- ✚ Non Communicant (eg. the two above, or 'by exception' after interview)

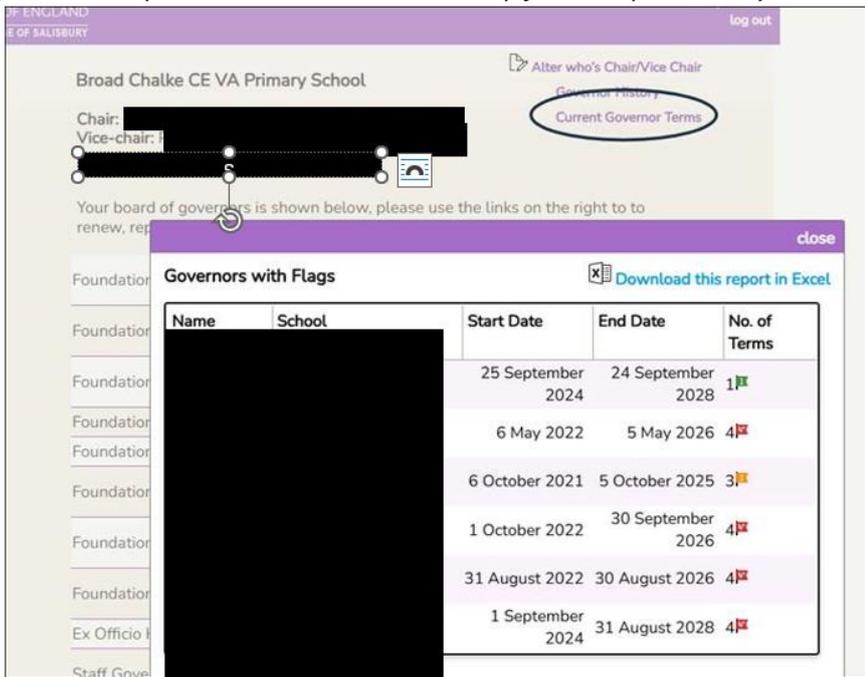
This Church School Governance website will allow you to:

- change addresses, e-mail address and terms of office
- add a new governor – Non foundation
- remove/resign/renew a governor
- change a nominated role- chair or vice chair
- add a new Foundation Governor which will create an application process
- renew a term of office

NEW UPDATES ON THE MICROSITE

Current Terms of Office report:

At the top of the page on the right-hand side there is a clickable 'Current Governor Terms' option. This allows you to see the current terms of office **AND** be able to download an excel spreadsheet (*Names and positions have been covered up for Data protection*)



Broad Chalke CE VA Primary School

Chair: [Redacted]
Vice-chair: [Redacted]

Alter who's Chair/Vice Chair
Governor History
Current Governor Terms

Your board of governors is shown below, please use the links on the right to renew, rep...

Download this report in Excel

Name	School	Start Date	End Date	No. of Terms
[Redacted]	[Redacted]	25 September 2024	24 September 2028	1
[Redacted]	[Redacted]	6 May 2022	5 May 2026	4
[Redacted]	[Redacted]	6 October 2021	5 October 2025	3
[Redacted]	[Redacted]	1 October 2022	30 September 2026	4
[Redacted]	[Redacted]	31 August 2022	30 August 2026	4
[Redacted]	[Redacted]	1 September 2024	31 August 2028	4

On the righthand side you can also see the number of terms columns:

- We have introduced Terms of Office Flags. This will show very quickly which term of office the governor is on.
- The flags are clickable and will show the **Foundation Governor History**

Governor History

Governor History for Louise Hall

Role	Start Date	End Date
Foundation Governor	01/08/13	05/10/17
Foundation Governor	06/10/17	05/10/21

The intention behind this is so that the clerk can quickly see who is on what term and whether recruitment needs to happen or a renewal. Occasionally the system will incorrectly pick up overlapping or 'shorter' terms of office and may therefore assign a flag denoting more terms of office than those that have actually been completed (per 4 years).

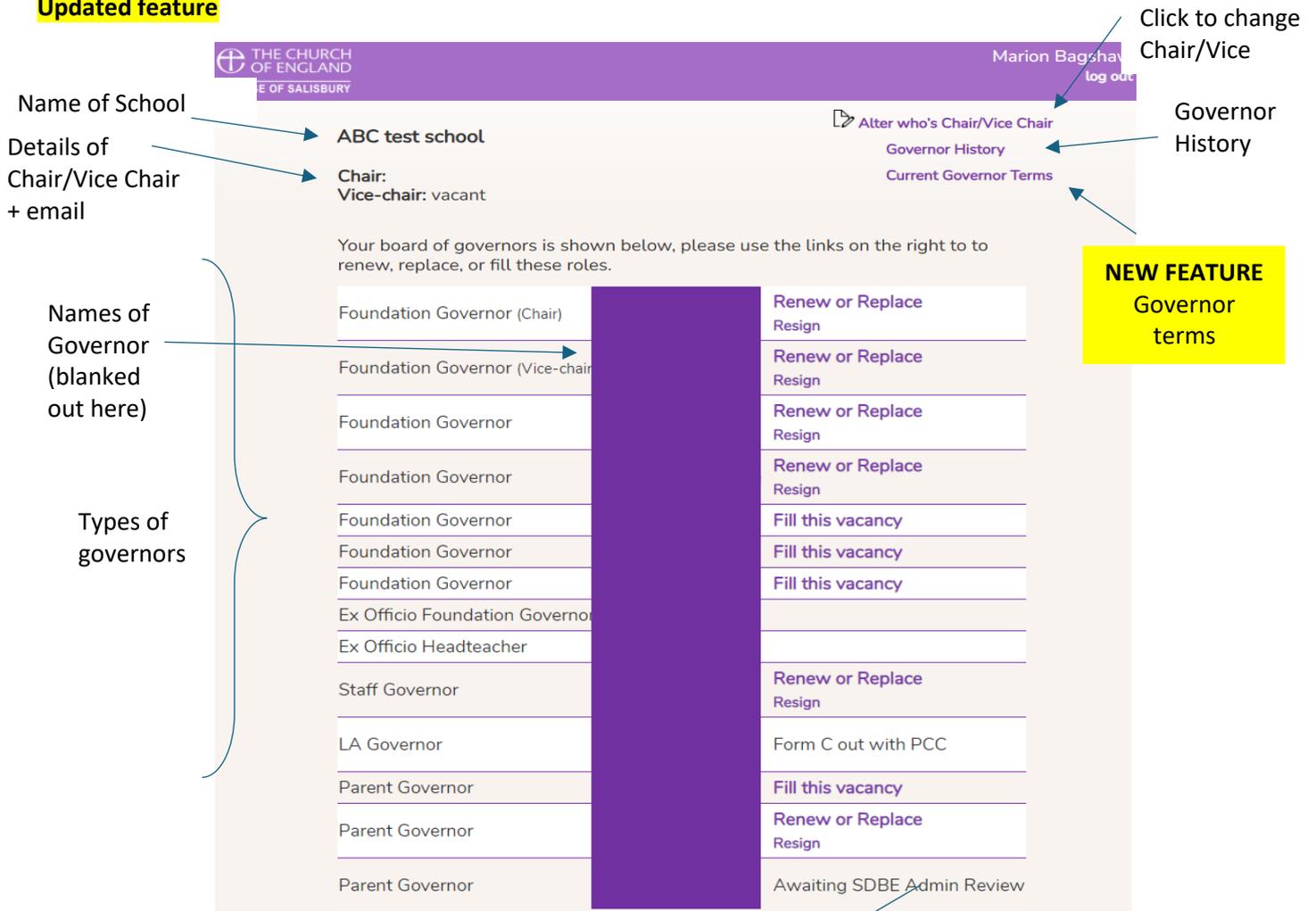
FORM A (Application Form) & Form B (Referee Form)

On the SDBE Governance website page you will see your list of governors. Next to each Foundation Governor you will see a grey FORM A & FORM B icon. These icons are clickable and will allow you to see the original application form and completed reference form



Microsite Page Features

Updated feature



The screenshot shows the SDBE Governance website interface. At the top, there is a purple header with the Church of England logo and the name 'Marion Bagshaw' with a 'log out' link. Below the header, the school name 'ABC test school' is displayed. To the right, there are links for 'Alter who's Chair/Vice Chair', 'Governor History', and 'Current Governor Terms'. A yellow box highlights the 'NEW FEATURE Governor terms' link. The main content area shows a list of governors with their roles and actions. A large purple vertical bar obscures the names of the governors. Annotations point to various features: 'Name of School' points to 'ABC test school'; 'Details of Chair/Vice Chair + email' points to 'Chair: Vice-chair: vacant'; 'Names of Governor (blacked out here)' points to the obscured names; 'Types of governors' points to the list of roles; 'Click to change Chair/Vice' points to the 'Alter who's Chair/Vice Chair' link; 'Governor History' points to the 'Governor History' link; and 'Action/update/where in process' points to the 'Awaiting SDBE Admin Review' status.

Role	Action/Update/Where in process
Foundation Governor (Chair)	Renew or Replace Resign
Foundation Governor (Vice-chair)	Renew or Replace Resign
Foundation Governor	Renew or Replace Resign
Foundation Governor	Renew or Replace Resign
Foundation Governor	Fill this vacancy
Foundation Governor	Fill this vacancy
Foundation Governor	Fill this vacancy
Ex Officio Foundation Governor	
Ex Officio Headteacher	
Staff Governor	Renew or Replace Resign
LA Governor	Form C out with PCC
Parent Governor	Fill this vacancy
Parent Governor	Renew or Replace Resign
Parent Governor	Awaiting SDBE Admin Review

You will be able to see:

- all your governors, (constitution)
- their roles and status,
- their terms of office,
- those due to expire in the next six months,
- their training record
- governance history

Change Contact details/terms of office

Click over the Governors name

LA Governor	Greta Greatham Renewing Position	Form C out with PCC
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To change the governors e-mail address, address, if they are a parent at the school, religious denomination or occupation please click

To change the governors term of office start or end date please click here

Governor details close

Governor Details [edit these](#)

Name: Greta Greatham
Email: test@email.com
Telephone:
Address1: 20 Short Street
Address2: Smallville
Address3:
Address4:
Address5:
Postcode: SP1 1AA

Terms of Governance
Started **27 February 2020**, no **end date** specified

Training History
No courses attended

Governance History
No prior governor posts

Click [Save](#) to save the changes

When you have finished editing you will need click [Close](#)

This page also contains the individual details of the governor's history and also any courses they have attended which you can click to see

To add a new governor – non-foundation

Click on **Fill this vacancy**

Staff Governor

vacant

Fill this vacancy

A data entry box will appear.

Fill in the information required. Click **Save**

Please record the name and email of the Nominee for this Role

This must be their home address

Initialise Nomination

School ABC test school

Role Staff Governor

Title

First name

Last name

Start Date 

Email

Address1

Address2

Address3

Address4

Address5

Postcode

Save

This is what will appear on the microsite. The SDBE team will then check the system and accept the changes that you have made on the system Please ensure a postcode is provided.

Staff Governor

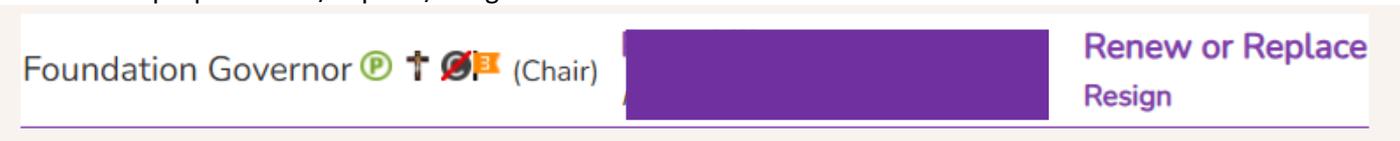
vacant

Nominee: Marion
Bagshaw

Awaiting SDBE Admin
Review
Starting on 01/01/25

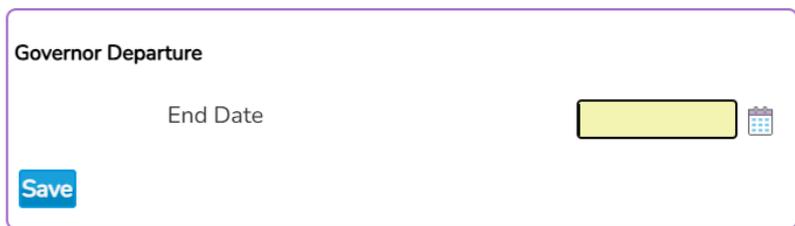
To remove a governor

Click on the purple Renew/Replace/Resign



Then record the leaving date of the person. Select the date with the calendar icon and save. Depending on the date given, this role will show as a vacant position or an end date.

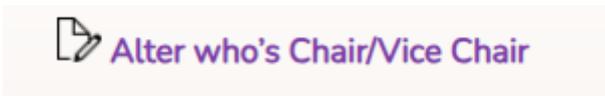
Please record the leaving date of the governor that is resigning



At this point, if you have the name of the replacement, you can add the new person onto the system. Click replace, add the details and then save.

To change a nominated role – chair or vice chair

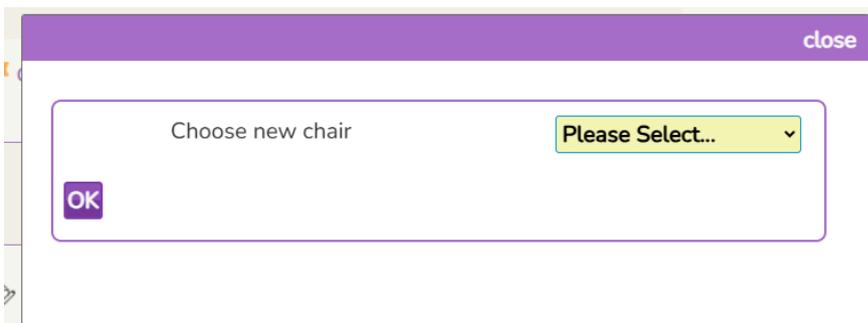
Click on



There are 2 options of how to do this:

1. Click on the  icon

Select the new Chair from the drop-down arrow – names of the governors will appear
Click ok.



2. Click on the  icon next to the individual governor name the list on the page



This box will appear.

Edit whether governor is chair/vice chair
close

The governor is not currently a **chair**

Make them...

- [Chair](#)
- [Co-Chair](#)
- [Interim Chair](#)

- [Vice-chair](#)
- [Co-Vice-Chair](#)
- [Interim Vice-chair](#)

Click the role

When you have finished click at the top of the main microsite page the green arrow

 [Finish altering who's Chair/Vice Chair](#)

To add a Foundation Governor

Click 'Fill this vacancy'

Foundation Governor
vacant
Fill this vacancy

As before with non-foundation governor add in the details.

Please record the name and email of the Nominee for this Role

Initialise Nomination

School

Role

Title

First name

Last name

Email

Address1

Address2

Address3

Address4

Address5

Postcode

Save

Click Save – The Nominee will automatically be sent an e-mail from the system
This will then show on the microsite as:

Foundation Governor *vacant* Form A out with Nominee
Nominee: Application

At each step in the process once the online forms have been completed (by pressing submit), the next form is auto sent out for completion

For VA/VC Foundation Governors in LA Maintained Schools

- FORM A – Application Form
- FORM B – Reference from Church Leader/ Interview
- FORM C – PCC Secretary (when position agreed by board)
- FORMN C – Chair of Governors
- SDBE checks & APPROVAL

For Academies LGBs/committees

- FORM A – Application Form
- FORM B – Reference from Church Leader
- FORM C – SDBE Corporate Member
- FORM C – Chair of Trust (or approved person) when position agreed by board
- SDBE checks & APPROVAL

The nomination process may stop for various reasons and both the clerk and SDBE will be informed if this happens. Examples of situations that would cause this would include:

- a staff member applying for a Foundation role
- any of the people above not approving the nomination
- an incorrect e-mail address being provided
- a role required for approving the nomination not being filled
- a serving Foundation governor applying for a 4th term of office in the same role

To Renew a Term of Office

Click Renew



The details of the current governor will automatically show in the boxes, the clerk will need to check that the details are correct especially **the email if a conversion into an academy has taken place.**

Click save.

1. For Foundation Governors the postcode must be the governor's home postcode)
 - For Foundation Governors the nomination process will start as per a new Foundation Governor
2. For Non-Foundation Governors the clerk's page will be automatically updated and the SDBE will be notified to check for duplicate entries on our database and then agree the appointment. As per above