



The Journey of a Locum Clerk

Parish & Town Councils Lessons Learned, Pitfalls Avoided

● LEE JAKEMAN, PARTNER LGRC LOCAL GOVERNMENT RESOURCE CENTRE

SCRIBE ACADEMY WEBINAR

What You'll Take Away Today

Practical tips drawn from 15+ years as a Town Clerk and Locum

1



“What to Do in Your First Week —Before the Council Realises You Don’t Know Where Anything Is”

- **Go to the council’s website on Day One** find the minutes, policies, AGAR and payments register. It’s faster than the computer and shows you what the public can see.
- **Check councillor attendance records immediately** anyone near six months’ absence faces automatic disqualification.
- **Use the website as your ongoing mirror** — if you can’t find something on it, ask whether it should be there.

2



“How to Give Advice That Protects You, Informs the Council, and Keeps You Out of the Politics”

- **Where you can, present options** rather than a single answer state your recommendation and your reasons, but let the Council decide.
- **Consider including do nothing** as a legitimate option and explain its consequences so the Council can make an informed choice.
- **Useful holding phrases** : My initial thoughts are..., Something can be done but I need time to think through the detail.

3



“What the Next Clerk Will Find When You Leave — and How to Make Sure It’s Something to Be Proud Of”

- **Start a handover document today** not when you decide to leave. Update it quarterly.
- **Keep the website up to date** your successor will use it on Day One, just as you should.
- **Ask yourself once a year** : If I left tomorrow, what would the next clerk find? The answer is your professional legacy.

About Me



THE TAKEAWAY

Military precision + corporate insight + 15 years on the ground = a locum clerk who truly understands councils.

DELIVERED THROUGH

LGRC LOCAL GOVERNMENT RESOURCE CENTRE

What I've Seen & Done

15 YEARS AS A TOWN CLERK



Core Council Services

Day-to-day delivery of essential community infrastructure and amenities across multiple sites.

Cemeteries **Public Toilets**
Parks & Grounds **Markets**
River Management **Community Halls**



Heritage & Civic Assets

Stewardship of nationally significant buildings and scheduled ancient monuments requiring specialist care.

Listed Town Hall **Ancient Monuments**
Conservation



Civic Ceremonies

Organising and delivering formal civic occasions with full regalia, protocol, and public dignity.

Mayor Making **Wigs & Gowns**
Investiture of Freeman



Community Events

Planning and running large public events that bring communities together throughout the year.

Carnivals **Christmas Lights**
Remembrance Parade



Delivering Through Covid

Maintained critical services throughout the pandemic including markets and burials when others stood down.

Markets During Covid
Burials During Covid **Continuity of Service**



Once-in-a-Career

Led landmark projects and national events that few clerks ever experience in an entire career.

Town Hall Refurbishment
Olympic Torch Relay
Commonwealth Torch



A DELIBERATE LEAP

The Decision to Go Locum

Instinct over caution — the same approach as leaving the RAF



LEFT WITH NOTHING LINED UP

Departed the last permanent post with no offers in hand a deliberate, high-risk move mirroring the instinct used when leaving the RAF.



NETWORKED THROUGH COUNTY ASSOCIATIONS

Put name around local county associations and expected a quiet two-to-three-month sabbatical before anything materialised.



LGRC CALLED THE VERY NEXT DAY

LGRC Local Government Resource Centre made contact almost immediately, asking if available to start the following day at a large council in Wales.



HAS NOT STOPPED SINCE

Demand for locum support proved immediate and sustained early engagements all involved conflict between councillors, staff, or community groups.



I left with nothing lined up. It worked out exactly as it did when I left the RAF —instinct proved right.

Arriving at a New Council – Day One



PC & System Access

Locate the laptop or PC login password and the accounts package credentials before attempting any administrative work.

CHECK FIRST



Bank & Finance Access

Confirm who holds the bank payment login details and ensure you have authorised access to make or approve transactions.

CRITICAL



Utility Account Passwords

Gather login credentials for energy, water, and other utility service accounts often overlooked and hard to retrieve later.

LOCATE EARLY



Site & Physical Access

Obtain padlock codes for allotments, building keys, and any site access details simple gaps that cause real operational delays.

PRACTICAL



Councillor Attendance

Review attendance records immediately any councillor approaching **6 months' absence** faces automatic disqualification under the Local Government Act.

LEGAL RISK



Check the Council Website

Go to the public website first find the latest minutes, policies, last year's AGAR, and payments over £500. Faster than the computer, and shows you what the public can see.

DAY



Ongoing tip: When you need to check standing orders, financial regulations, or hall booking fees go to the website first. It reminds you what the public can see and prompts you to keep it up to date.

“

Almost every first meeting required asking why councillors didn't put their hands up to vote — or asking them to clarify the actual proposal being voted on.

— FIELD OBSERVATION LOCUM CLERK

Poor meeting management is widespread across parish and town councils. The locum's role begins the moment they walk through the door.

The Politics of *Arrival*



Staying Neutral on Arrival

Councillors will immediately try to win your favour or share grievances about the previous clerk. Listen professionally but take no sides and make no judgements on day one.



Managing Grievances

You will hear why the last clerk left, who was difficult, and who is to blame. Acknowledge without agreeing. Your credibility depends on being seen as impartial from the outset.



Meeting Management Basics

Voting by show of hands, clear proposals before debate, and proper minute-taking are frequently absent. Restoring basic procedure is often the first and most visible contribution a locum makes.



Professionalism Under Pressure

Political dynamics can be intense in small councils. Consistent, calm professionalism applying the same standards regardless of who is in the room is the locum's most powerful tool.



Key Insight: *The locum's value is established in the first meeting not by what they know, but by how they hold the room with calm, impartial authority.*

FREEDOM OF INFORMATION

FOI — Keep It Simple

If you have the information, provide it. Don't worry about why they want it.

STANDARD ACKNOWLEDGEMENT TEMPLATE

"Thank you for your email which is being handled as a Freedom of Information request. You have asked: *[repeat the exact request]* . We will look to respond by *[date 20 working days]* .



Acknowledge within 5 working days. Respond within 20. FOI is about documents that exist not opinions, thoughts, or reasons behind decisions.



Best practice: If key documents are on the website, you can simply signpost FOI requests there. Proactive publication reduces FOI volume.

MANAGING CORRESPONDENCE

Persistent & Difficult Correspondents

Not every email deserves an immediate reply — and some don't deserve one at all



Don't Respond Quickly to Get It Out of Your Inbox

A fast reply simply encourages the next email to arrive the same day. **Pace your responses** a considered reply after a few days is more professional and less rewarding for the persistent sender.



A Question Has a Question Mark

If an email is a rant with no actual question, **park it or ignore it** . You are not obliged to respond to correspondence that makes no request. Save your energy for genuine enquiries.



Recognise “Intellectual Sport”

Some correspondents ex-councillors, self-appointed local experts treat council correspondence as a hobby. **Don't be drawn in.** Respond once, clearly, and do not engage in extended debate.



Most Enquiries Are Genuine — Welcome Them

The majority of correspondence comes from people who care about their community. **Treat every genuine enquiry with respect** it can help you, the Council, and the people you serve.



Key Principle: *Manage your inbox don't let it manage you. Pace, proportion, and professionalism are your tools.*



| COMMON PITFALLS

Documentation & Record-Keeping



STRUCTURED FILING SYSTEMS

Consistent folder structures on shared drives prevent documents from becoming impossible to locate or trace.



AGENDAS WITH ACCOMPANYING REPORTS

Every agenda item must be supported by its report without this, the factual history of ongoing matters is lost.



CONSISTENT NAMING CONVENTIONS

Standardised file naming allows any clerk current or incoming to find and understand documents immediately.



UNDERSTANDING THE HISTORY OF MATTERS

Poor records make it impossible to understand how decisions were reached or what commitments were made previously.

Finance, AGAR & Compliance



Transparent Financial Management

Accurate, transparent accounts prevent disputes between councillors and staff. Compliance with **Standing Orders and Financial Regulations** is non-negotiable; everything comes down to the money.



Don't Panic About the AGAR — Prepare

Read the **SAPPP from cover to cover**. When the External Auditor's notice arrives each year, read every word and follow every link. Preparation removes the fear.



Use Industry-Standard Software

SCRIBE or **Rialtas** produce figures precisely aligned with the AGAR and come with dedicated helplines. Avoid spreadsheets unless you are a very small parish.



Know Your Regulations

Read your **Standing Orders and Financial Regulations** thoroughly they are your framework for every financial decision. Familiarity protects you and your council.

Where to Get Professional Advice

Not all sources are equal — choose wisely

APPROACH WITH CAUTION **Risky Sources**

 **Facebook Groups**
Questions often lack clarity and answers frequently misunderstand the question entirely.

 **Unknown Credentials**
You have no way of knowing who these people are or what their actual experience is.

 **Confirmation Bias**
Responses often tell you what you want to hear rather than what you need to know.

 **Inconsistent Guidance**
Contradictory advice from multiple strangers creates confusion rather than clarity.

RECOMMENDED **Trusted Sources**

 **County ALC (Association of Local Councils)**
Your county association provides trusted, sector-specific guidance from people who know local government.

 **SLCC (Society of Local Council Clerks)**
The professional body for clerks authoritative support, training, and a network you can trust.

 **SCRIBE Helpline**
For software questions, go directly to SCRIBE their helpline provides accurate, product-specific guidance.

 **Your Trusted Network**
Those you know and trust are likely already in your network lean on established professional relationships.



Key Principle: Before posting on Facebook, ask yourself is there a sector body, professional helpline, or trusted colleague who can give you a reliable answer? The answer is almost always yes.

“ *Bodging things to get things done doesn't fix problems — it buries them.* ”

A hard-won lesson from the field — and one most clerks learn too late



Surface It **DON'T BODGE**

Let issues emerge naturally covering for poor practice only enables more of it.



Your Ally **INTERNAL AUDITOR**

Let the auditor rip it apart. Standing orders must be followed or formally rewritten.



Fire Doors **RULES EXIST FOR A REASON**

"We always do" is not a reason. Rules are there to prevent serious harm not inconvenience.



Judgement **BALANCE PRAGMATISM**

Some balance is required severity of situation matters when deciding when to hold the line.



Covering for poor practice only enables more poor practice know when to let the system do its job.



TOWN HALL REDEVELOPMENT

PROJECT GOVERNANCE

Large Projects — Know You're the Client



The Clerk Experience Gap

Councillors overestimate their project management ability, commit enthusiastically, then disappear leaving the Clerk holding the baby.



You Are the Client

The Council foots the bill and must call the shots. Too often this fundamental fact is forgotten during large-scale projects.



Contractors Report to You

Architects and project managers do not dictate terms at site meetings they report to the client. Reclaim that authority.



External Help Isn't Always the Answer

Bringing in consultants can help, but only if the Council still leads. Know when to take charge rather than delegate control.



The Council is the client — and it should always be calling the shots.

Managing the Clerk Role — Transparency & Boundaries

14 / 20



Write Clear Reports

Explain decisions you need from councillors; give them the context to act confidently and correctly. Transparency builds trust and reduces misunderstanding.



Keep a Timesheet

Record your daily activities so councillors have meaningful oversight of how your time is spent. Visibility prevents assumptions and unrealistic expectations.



Set Core Working Hours

Establish guaranteed hours to prevent the expectation of constant availability. Flexibility can still exist within a clear, agreed framework.



Have Honest Conversations

Accept strong challenge, compartmentalise issues, and build trust through direct and transparent communication with councillors and colleagues.

Key Lessons from the Journey



Know What You Don't Know

Saying "I don't know" is a strength, not a weakness. Admit gaps early and seek expert advice before problems escalate into crises.



Use Sector-Specific Tools

Rialtas and other industry-standard systems save time and reduce errors. Use what the sector trusts, not generic alternatives.



Document Everything

Record concerns in detail and maintain a clear paper trail. Thorough documentation protects both you and the council when questions arise.



Stay Out of the Politics

Focus on your professional duties and remain impartial. Being drawn into internal disputes undermines your credibility and effectiveness.



Small Errors Cause Big Disasters

The simple mistake at the very start often creates the crisis at the end. Check the basics carefully early rigour prevents late-stage emergencies.



Seek Trusted Advice

ALC, SLCC and experienced colleagues are invaluable when you're unsure. No locum should navigate complex situations entirely alone.



LGRC
LOCAL GOVERNMENT RESOURCE CENTRE

A Resource Centre for Councils

Flexible, skilled resource when and where councils need it most



Interim Clerk & RFO Cover



HR, Recruitment & Training

Finance & Compliance Advice



Public Engagement & Outsourced Services



Independently motivated to serve councils so they can better serve their communities not on the side of councillors, officers, or any interest group.

WHY CHOOSE LGRC

Partners & Associates — More Than a Sole Trader

Excellence cultivated through a cadre of capable, sector-leading professionals



Partners & Associates

Associates are offered work on merit. Only the best are invited to become Partners a stronger commitment on both sides, including priority contracts and ownership benefits.



Insurance & Contracts

Professional indemnity cover, contracts negotiated on your behalf, and a structured procurement process protection a sole trader cannot match.



Network & Knowledge

A shared library, templates, internal workshops, and a support network of peers, so no partner or associate ever has to navigate a difficult situation alone.



Continuity of Cover

If one person is unavailable, LGRC can likely provide a replacement. A sole trader simply cannot offer this resilience to a council in need.



Formal Contracts

Clear agreements articulate scope, duration, and expectations for both parties removing ambiguity and protecting the council from the outset.



Growing Capability

LGRC is actively investing in induction, mentoring, and development building a cadre of technical leaders who raise standards across the sector.



Key Point: LGRC's mission is to offer excellent, flexible resource that adds real value to councils and to the communities they serve.

Your Legacy — Think About It Now

One day you will leave. What will the next clerk find when they arrive?

“

Every clerk I took over from had left quickly — and none of them had left a handover.

FIELD EXPERIENCE 3 PERMANENT ROLES

Whether you retire, move on, or simply step back **your legacy is being written right now** , in every file you save, every process you document, and every system you put in place. Make it a positive one.

WHAT A POSITIVE LEGACY LOOKS LIKE



Well-Structured Records & Filing

A logical, consistent filing system means your successor can find anything from day one not spend months piecing together the past.



Documented Processes & Procedures

Write down how things are done from the AGAR to the allotment padlock code. Don't carry it all in your head.



Industry-Standard Systems in Place

Using SCRIBE, Rialtas, or other recognised tools means your successor has a familiar platform and a helpline not a bespoke spreadsheet.



A Council in Good Governance Health

Standing orders followed, finances transparent, councillors well-managed hand over a council that is in good shape, not one in crisis.

PROFESSIONAL AUTHORITY

Know Your Sources

Be ready to cite the original legislation or guidance not just your own opinion.



Charles Arnold-Baker Local Councils Administration

The definitive reference text for parish and town council law. Know it thoroughly — and know where to find the relevant chapter quickly.



Smaller Authorities' Proper Practices Panel (SAPPP)

The authoritative source for financial governance guidance. Read the guidance from cover to cover every year.



Primary Legislation & Statutory Instruments

Local Government Act 1972, Accounts & Audit Regulations 2015, and other relevant statutes. Always go back to the original source.



The Council should not be assured of something **because the Clerk said so** but because the Clerk was able to produce the underlying legislation or guidance when asked.

IN PRACTICE

Being Ready When Challenged

Authority comes from the source, not the speaker



Locate Legislation Quickly

Know how to navigate legislation.gov.uk and your key reference texts. Being able to pull up the relevant section in a meeting is a powerful professional tool.



Cite the Source, Not Just the Conclusion

When advising the Council, name the Act, Regulation, or guidance document. The Accounts and Audit Regulations 2015 require... carries far more weight than I think we need to...



Use Your County ALC & SLCC

When you are unsure, seek advice from your county association or the SLCC before advising the Council. Verify your understanding before presenting it as fact.



“I Don't Know” Is a Professional Answer

Saying I'll check and confirm is far better than giving an incorrect answer with confidence. Clerks who bluff lose credibility quickly.



Key Principle: *Your authority as Clerk rests on the quality of your sources not the confidence of your delivery.*

Getting Good Decisions from the Council

Write a report for almost every agenda item serial-number them for future reference

1



Aim

USE AS THE AGENDA ITEM

State clearly what the Council is being asked to do. This becomes the agenda item itself.

To receive the AGAR and supporting information and to consider a recommendation that the Council: (a) approves the Annual Governance Statement; (b) approves the Accounting Statements.

2



Background

HISTORY & CONTEXT

Provide the legislative basis, history, and context. Reference previous minutes by number.

The Council is required to approve the AGAR annually under the Accounts and Audit Regulations 2015. Documents prepared by the RFO in accordance with External Auditor instructions and SAPPP guidance. Last year's AGAR attached. Sign-off required by 30 June. Internal auditor's report attached. Year-end balances approved at May meeting (Minute 47 refers).

3



Discussion

ADVICE & ANALYSIS

Set out the main points of the argument, the Clerk's professional advice, and any risks or compliance issues. Note any missing elements or failures that need addressing before a decision can be made.

The internal audit is satisfactory. All supporting documents are in order. The Council appears to have complied with all requirements. No issues identified that would prevent approval.

4



Summary

BRIEF OVERVIEW

A concise paragraph summarising the document and the Clerk's overall assessment.

We have received the required instructions from the External Auditor and appear to have complied with all requirements. The AGAR is ready for Council approval and submission within the statutory deadline.....

5



Options & Recommendation

ALWAYS LIST OPTIONS

Always list at least two options even if one is to do nothing. Then state the Clerk's recommendation clearly.

*Option 1: Approve the AGAR and authorise the Chairman to sign.
Option 2: Defer approval pending further information (note: this risks missing the 30 June deadline).
Recommendation: Option 1.*

PROFESSIONAL CONDUCT

The Clerk as Adviser

Your role is to inform and advise *not to decide*. The Council decides.



Always Offer Options, Not Instructions

Look to avoid saying I would do xyz. Present a number of options some more suitable than others and let the Council choose.



Every Option Must Be Viable

Each option listed must be one you are reasonably content with it must not put the Council at unnecessary risk.



Do Nothing Is Often an Option

Maintaining the status quo is a legitimate choice. Include it and explain its consequences clearly.



Stay out of the politics. If the Council decides something you disagree with as long as it is not illegal **get on with it**. Document your concerns, but implement the decision.

IN PRACTICE

Framing Options & Using the Right Language

How to advise with authority without overstepping your role

WHEN PRESENTING OPTIONS

State Your Recommendation Clearly

You will see from my report that I have come to the conclusion that Option 2 is the best solution. Then give your reasons: it delivers the requirement, it is best value, it takes advantage of time-limited funding.

Explain Why One Option is Preferred

Reasons might include: *it meets the requirement adequately; it is best value for money; additional funding is only available now; the urgency slightly outweighs the small increase in cost.*

Make Each Option Genuinely Adequate

If you list an option, you must be content if the Council chooses it. Never list a dummy option you would refuse to implement.

USEFUL PHRASES IN CONVERSATION WITH MEMBERS

IMMEDIATE RESPONSE

*“My **initial thoughts** are that Option X is worth exploring— it solves the immediate crisis and matches our current policy.”*

BUYING THINKING TIME

*“Something **can be done**, but you will need to give me time to think through the detail before I can advise properly.”*

FLAGGING RISK WITHOUT DECIDING

“I’m not sure about the VAT implications — have we checked land ownership? Are there covenants? I’ll need to confirm before we can progress.”

DOCUMENTING CONCERN

*“We **can do it**, but I would need more hours, additional budget for external help, and a DPIA completed first.”*



Key Principle: The Clerk advises the Council decides. Your job is to make sure every decision is well-informed, properly documented, and one you can implement with integrity.

Thank You

Any questions?

LEE JAKEMAN, PARTNER

LGRC Local Government Resource Centre



Info@lgrc.uk

Tel 01404 45973