**Useful hints and tips for CiLCA Students**

* All documents must be dated within the last 6 months.
* Remember to use all four annotations notes bullet points
* Personal statement: provide a personal statement explaining your role and experience in the sector and information about your council such as total budget, the electorate and the council’s activities. (MAX 400 words)
* All policies referenced throughout portfolio – review dates must match
* Standardise how to write the Clerk, Council and Chairman – capitalise throughout whole portfolio
* Don’t abbreviate legislation i.e. LGA 72 – The Local Government Act 1972

**Unit 1**

**LO1** - Legal justification for each of the role is often missed. The legislation requiring or permitting the role should be stated.

Duties are often confused with responsibilities - particularly for the clerk where items from the job description are often included. An example is 'writing the minutes'. Yes, minutes must be taken and retained as a record of council business but the clerk is not obliged to take or write them.

Legislation is often written incorrectly or abbreviated - this would not warrant a referral but assessors are advised to comment.

**LO2** - The candidate is expected to do research, present it in a clear and logical way to the council and showing options / recommendations.

**LO3** - Some candidates miss legislation references off the list. Some review dates have expired due to the Covid-19 situation. The key date is the date completed by the candidate. If no date is shown and there is no explanation given - eg annual meeting not held, then a referral is likely.

**LO4** – this is a new LO, no known common pitfalls as yet.

**Unit 2**

**LO5** - this is a new LO, no known common pitfalls as yet.

**LO6** - some candidates do not give the current figure for the annual allowance; this would not incur a referral.

**LO7** - candidates still have issues with the eligibility criteria; usually this is usually because they do not refer to the qualifications that the clerk must have and just say 'qualified clerk' and give the legal reference. The guidance states that 'It is not necessary to provide the details of relevant qualifications as long as both qualifications are recognised.' They do not have to specify the level 4 qualification precisely, but 'qualified clerk' is insufficient. Risks and restrictions are also an issue - they are frequently muddled together and don't relate to the examples given.

**LO8** - annotations vary a lot on this LO. Some contracts are from years ago and the candidate should annotate changes in legislation that have occurred in the meantime. Problems often arise where councils have not used recommended templates. Equality policies are also variable - many only refer to recruitment and not the wider responsibilities that councils have. If the latter, the candidate should demonstrate by a comment that they understand that legislation relates to council services too.

**LO9** - this usually is fine as long as the candidate describes the clerk's role as required and not the council's.

**LO10** -I f the candidate has submitted an agenda and minutes for two different ordinary meetings, this is not acceptable as the guidance states 'one set'. Although the candidates usually state that the election of chairman is the first business at an Annual Meeting, this is not always reflected in the minutes. If incorrect procedure has been followed then the candidate should annotate to explain and demonstrate that they understand what should have been done.

**LO11** - Standing Orders. Selecting four and commenting is usually fine. Some councils do not have up to date standing orders and, in some cases, this could cause problems.

**LO12** - usually fine though some candidates are a bit sparse on or omit delegation to clerk.

**LO13** - usually fine but a bit sparse on the non-statutory activities.

**Unit 3**

**LO14** - With commercial products, the candidate's annotations need to demonstrate their understanding of how the system works. The main point is that the precept fills the gap between non-precept income expected and expenditure needed to carry out the council's budget aims.

**LO15** - The candidate needs to understand the process of drawing up a cash book; this can be demonstrated by a written explanation or by annotated documents. The cash book must show VAT and where relevant s137 payments.

**LO16** – usually fine.

**LO17** - The Portfolio Guide allows for a candidate to make the application as a representative of a community group as an alternative to applying on behalf of the council, but it must be their own work.

**LO18** - This is a complex LO with four elements and it is easy for candidates to omit one, or to mix up their answers. Having the correct evidence of a regulation for contracts requires up to date financial procedures and standing orders. Many councils outsource payroll, but they must still give an explanation as to how it is managed.

**LO19** - Generally this is handled well but occasionally 19.3 is omitted or insufficiently evidenced.

**LO20** - The omission of one of the dates or the lack of distinction between duties of clerk and RFO are the main errors by candidates here. Some candidates use a table format which assists with word count and clarity.

**Unit 4**

**LO21**- no issues

**LO22** – Some councils are devising staff handbooks which contain policies and procedures for staff. Whilst these are often a good idea and may assist regular reviews of their contents, assessors should not have to wade through the whole handbook. Use of an index and a review table to bring items to the assessor's attention is helpful. It is the responsibility of the candidate to provide and explain their evidence. The candidate should not expect the assessor to be a detective!

**LO23** - Volunteers are often overlooked. If the council does not have a policy, it is acceptable for them to annotate one from another council to demonstrate understanding. Often this will result in a draft version for council approval. Assessors will encourage candidates to make positive changes.

Assessors should expect a policy to demonstrate connections between training, development and the council's objectives and to include some intention to evaluate training.