



AEFE PUBLICATIONS



# GUIDE TO THE IMPLEMENTATION OF THE AEFE “CONVENTION” AGREEMENT

in French Schools Abroad

Presented to the board of the AEFE  
at its meeting on 27 November, 2012





“ **This Guide to the Implementation of the “Convention” Agreement in French Schools Abroad is an amended, more detailed version of the original document, published in 2007.**

**The new guide is the result of an unprecedented level of consultation across the network of French schools abroad.** ”

I would like to thank the parents' associations and management bodies who contributed to this guide, particularly as part of the ten governance seminars organized by the AEFÉ within the regional training programs, and which were also attended by school management teams.

The aim of this guide is to give the school administrators appointed by the Agency and the management bodies a better understanding of each party's respective obligations and areas of expertise to promote good governance.

Although this document cannot address the full diversity of management bodies and their respective governing articles, or the many different local environments, it nevertheless sets out a number of general principles and recommendations that will contribute to establishing and maintaining harmonious relations between all the partners responsible for the future of the schools. The aim is to establish a sound basis of operation, to enable the schools to concentrate fully on their key mission: delivering the high standards of teaching that will set their students on the path to success.

The Agency's departments are available to provide any further information required by schools, or to help them implement the principles set out in this guide. I hope that this document will be read and referred to upon each renewal of the deliberative entities of school management or changes in administration teams.

*Paris, 17 december 2012*

**Director of AEFÉ**  
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## Introduction

# The “Convention” agreement between the Agency and the school management body sets out the principles governing their relations.

The text of the agreement is rather brief and sometimes elliptical. It is therefore necessary to explain it and to specify the procedures for implementing the standard agreement in the schools.

This document has been in effect since 2002. It is now useful to highlight the positive ways in which it has been put into effect in schools.

The guide has a twofold objective: to clarify the standard agreement and to encourage good practices in implementing its constituent principles.

The provisions of the agreement constitute the basic reference, while the function of the present guide is to provide a practical framework for both parties. It is necessary to first clearly identify the partners’ respective roles because difficulties often arise from the fact that not everyone understands the functions attributed to each party by the agreement.

The first part of the agreement, which is based on a standard model, encourages the partners to adapt the rules governing their relations to the specific context of their school, and to spell them out in the “specific provisions” section. The guide expresses recommendations, the application of which is highly advisable to ensure that the partnership operates on a harmonious basis.









# › Responsibilities of the partners and the organization of cooperation

## I.1 - Operation of management entities

It is not unusual for the articles regulating management bodies to include provisions on the role of the school principal but to say nothing about the principle whereby the chair's powers may be delegated in part to the school principal (or from the treasurer to the administrative and financial officer). Sometimes, agreements simply reproduce the content of the standard agreement with no "special provisions" adapting these general principles to the school's specific situation.

A clear distinction must be made between the points governed by the articles and those governed by the agreement.

### I.1.1 - Articles

The operation of the management body is determined by articles. These provide that, at a general meeting, the day-to-day management shall be delegated to a governing board, frequently referred to as a "management committee", "executive committee", "board" or "junta", which in turn delegates routine decisions to a smaller committee (chair and vice-chair, treasurer, secretary). **For practical reasons, the term "governing board" will be used thereafter to refer to the decision-making entity of the management body.**

The articles cover matters relating to the operation of the management body and its representative entities but not those relating to the operation of the school.

It is essential to keep in mind that French embassy representatives may not, under normal circumstances, be members of the management body. Nor can members of the school administration. They are its partners. For this reason, Article 4 of the standard agreement states that, "for purposes of shared information, the management body invites one or more representatives of the French embassy to meetings of its deliberative bodies".

### I.1.2 - The agreement

The agreement sets out the relations between the management body and the supervisory team (school principal and administrative and financial officer) appointed by the AEFÉ. This team manages the day-to-day operation of the school in the educational, material, human, financial and property areas, based on a policy mandate established with the management body and on the general policy of the AEFÉ on French education abroad.

### I.1.3 - The partnership

In order to ensure the smooth operation of the partnership, which is written in the agreement, the school governing board must include representatives of both signatory parties: management body representatives and Agency representatives (diplomatic representative, principal and administrative and financial officer).

**In schools with non-parental management, the Agency recommends that parent representatives be involved (through plenary meetings and commissions) in the work of the governing board.**

**The school principal and the administrative and financial officer take part in the work of the governing board in an advisory capacity.**

The management dialogue must be transparent and efficiently organized within the school. It must be formally recorded (minutes of meetings, records of decisions) in order to facilitate day-to-day operations and to promote the continuity of established practices when members are replaced (management team or member of the management body).

To ensure a wide consultation on the general orientations and the future development of the school, **the Agency recommends that the governing board hold an annual meeting** to include all members of the extended school community, representatives from the civil society, businesses, the economic department of the French embassy and councilors from the AFE (Assembly of French people abroad).

**This extended board would meet at least once a year, before the annual budget is drawn up,** in order to discuss, more specifically, the school's positioning in the host country, the competitive environment, the resources to be implemented in terms of property, and the cooperation with other international or local schools. It would also review the development plan to date and put forward suggestions or recommendations for subsequent use in decision-making by the management body. The meeting would also offer an opportunity to explain the school's strategic choices. **The school project, the situation regarding local competition and, where it is in place, the conference on three-year strategic guidelines, must be brought to its attention.**

The extended governing board should enable a more effective consultation between the management body and representatives of the embassy, the Agency, parents (if they are not already part of the governing board) and any other member of the school community.

Consultation among the various stakeholders (management body, the embassy's department for cooperation in educational and cultural affairs, AEFÉ executive management) in drafting the "specific provisions" of the agreement, complying with the principles of good governance set out in this document.

These "specific provisions" must set out, in particular, the makeup and field of competence of the extended board, taking care not to lose the flexibility and efficiency of parental management, which is the main driving force behind the success of French schools abroad.

**The extent of the powers delegated by the statutory entities of the management body to the principal and the administrative and financial officer appointed by the Agency must be discussed by the management body and formally set out in writing.**

The description of delegated powers should be detailed enough to set clear and explicit rules of operation, however, the crucial point is the way in which they are implemented by the partners. One cannot emphasize enough the importance of the quality of management dialogue, which is key to the effective and harmonious running of French schools abroad.

## I.2 - Management dialogue within schools

To operate smoothly, schools under a “Convention” agreement must combine due consideration for the roles and responsibilities of each partner with effective and mutually respectful cooperation.

Management operations cannot be separated from educational activities and school life in general. The principal is involved in management, and the educational policies implemented have repercussions on human resources as well as on finance and property issues.

**A well-managed school is a school with strong management dialogue at governing board level.** The standard agreement states that the principal is closely involved in school management on a continuous basis. The implementation procedures adopted locally must be set out in the “specific provisions”.

The principal and the administrative and financial officer must maintain a high level of communication with the management body, and more particularly with the chair and treasurer. Because they hold powers delegated by the management body (see paragraph II) and are also representatives of the AEFE, they are required to act in a very open manner. A full range of resources must be implemented to provide the partners with all available information: frequency of meetings, regular, informal contacts with the committee, participation of management body representatives in school meetings.

**In his/her capacity as Agency representative**, the principal must be closely involved in preparing the agenda drafted by the chair of the governing board.

**In their capacity as the holders of powers delegated by the management body**, the principal and the administrative and financial officer (DAF) have clear responsibility in the preparation of the budget (see below). However, their role is not solely to express their educational concerns or the requests formulated by the governing board and school council. They must also be closely involved in subjects relating to general school policy (changes to fees, wages and staff numbers), and track a number of good management ratios. The formal definition and publication of these ratios will provide input for the deliberative entities of the management body on the choices to be made. They will also provide a timely warning for the diplomatic representative and Agency, should a worrying trend emerge in key management parameters.

Calculating and projecting payroll over several years (particularly for local hires) through simple management charts, as well as monitoring student enrolment (analysis of changes in student numbers, including through close cohort monitoring), tuition fees and cash flow, are all concerns for both the governing board and the school administration.

## I.3 - Management dialogue between the Agency and the management body

### I.3.1 - A multi-year framework

Management dialogue must be carried out within a multi-year framework.

**A true partnership** between the Agency and the management bodies **calls for a medium-term vision to which the extended governing board must contribute.**

Upon their appointment, the Agency sends a letter of engagement to the principal as well as to the administrative and financial officer (DAF), asking them to draw up a development plan. This is a key change.

• **Drawing up a development plan** It is essential for the school's development to be addressed from a medium-term perspective. Based on this approach, the school must undertake a rigorous study, defining its strategy based on:

- estimated local demand for a French school: respective ratios of French and local children, and children of other nationalities, considered distribution by level, motivation of families to apply, etc.
- competition from other foreign or private national schools in the area. In this respect, the Agency is able to provide supervisory teams with performance indicators and analytical tools concerning the competition.



- possible alliances and partnerships (with our European partners in particular).
- required adaptation of educational content (“internationalization” through emphasis on foreign languages, improvement of sports facilities, etc.).

This type of study is frequently carried out to provide input for property investment decisions, where the estimated student population is a key factor. The goal is not only to determine the necessary surface area but also the financial resources that can reasonably be expected to go towards paying off loans.

However, even if there are no plans to acquire property, this study must still be carried out. In this respect, the Agency encourages schools to base their approach on the **conference on strategic guidelines** in order to obtain a clearer picture of the choices to be made, and the conditions governing the allocation of resources to be implemented over the next three years.

- **CA shared project.** This development plan avoids the risks of day-to-day adjustments. It also has the advantage of closely associating the management body, diplomatic representatives and the Agency. Drafted in consultation with all the partners, it is also intended to reduce the risk of conflict.

- **A plan that ensures strategic continuity beyond any changes of partners.** On taking up their functions, a new governing board, new principal, or new administrative and financial officer will find a binding set of guidelines that can only be revised with the agreement of all the stakeholders.

- **This development plan, which must be assessed annually, is set out in the school project and, for some schools, during a conference on strategic guidelines.**

### I.3.2 - A contractual definition of commitments

The commitments of both parties must be set out in a formal document.

In order to facilitate the practical implementation of the guidelines, the Agency will organize regional meetings and tours where possible. These will involve the general secretary, coordinators representing

AEFE executive management or task forces from the school advisory and consultancy unit.

The objectives are to:

- finalize the medium-term strategic plan with the management body,
- explain Agency policy to the partner and enable the Agency to better understand the concerns of the heads of management bodies.

Regarding this last point, while principals from each geographical region meet every year, there is no such meeting planned for chairs and treasurers of management bodies. The Agency wishes to improve consultation with these key partners who should be able, as soon as possible after appointment, to attend a presentation explaining how a school with an AEFE “Convention” agreement works. This will enable them to fully appreciate their position as actors in a global network, and to understand the objectives, operating principles and governance rules of this network. The Agency’s priority is for the training program in each geographical area to include a seminar for discussion and information for the benefit of the heads (chair and treasurer) of the management boards. The principals and the administrative and financial officers of the schools concerned will also be invited.



› **Role of the principal and the administrative and financial officer in the liaison with the chair and the treasurer of the management body**

This role is complex and crucial, because it should help bring together the viewpoints of the two partners: the management body and the AEFE.

**The principal has his/her own powers as well as those delegated by the management body, while remaining an Agency employee.**

## II.1 - Powers and responsibilities specific to the principal

### II.1.1 - Educational responsibility for the school

**The principal is solely responsible for the educational management of the school.**

It must be pointed out that a school with an AEFE “Convention” agreement must first meet the necessary conditions to be accredited, i.e. it must be deemed to comply with French educational standards by France’s interdepartmental commission for the accreditation of French schools abroad, chaired by the French Ministry of Education.

The education provided by the school must comply with the syllabuses, teaching methods and organizational rules applicable in French schools: adjustments may be made provided that they are approved by the AEFE. Should the interdepartmental commission not renew a school’s accreditation, the convention-agreement would be rendered null and void.

### II.1.2 - Ensuring compliance with the rules and criteria of accreditation

The principal guarantees the compliance of teaching with the rules of accreditation. This responsibility forms the basis of his/her powers.

In this respect, he/she has authority over all members of school staff, regardless of position and contract type.

**Admissions are managed in accordance with the legal requirements placed on the AEFÉ.**

**The principal decides on student admissions.** This principle may be adapted when there is more than one school in the same city. In this case, the embassy's department for cooperation in educational and cultural affairs (SCAC) may help organize students admissions.

Every year, the principal must inform the Agency of student enrolment per class and per elective, the types of French baccalaureate offered, the languages and electives available, as well as the number of hours devoted to each subject. The AEFÉ must be provided with all the necessary data to make sure that any adjustments do not reduce the annual number of teaching hours as set by France, or cut into the French curriculum.

The Agency appoints school principals on the basis of a profile drawn up after discussions with the diplomatic representative and management body. It is the Agency's responsibility to identify the most suitable candidate, following a rigorous selection process based on a jointly established job description, including as much detail as possible. The Agency will encourage the selected applicant to meet any representatives of the management body who so wish, prior to taking up the job. It will also ensure that the governing board is informed of the principal's role and responsibilities.

### II.1.3 - The school council

**The principal does not apply his/her expertise in the field of education alone.**

The fundamental role played by the school council needs to be highlighted. It is a forum for communication and consultation, exchanging information and ideas, developing projects, and assessing and commenting on the results of initiatives put in place. For matters relating to teaching and school life, the school council plays the same role as the governing board does for administrative, social and financial questions. With the approval of this entity – a platform for discussion and suggestion – projects submitted by the principal gain a unanimously recognised legitimacy based on the collective deliberations of the actors making up the educational community. This is also where teacher representatives present their proposals.

To avoid confusion, it should be noted that management issues do not fall within the responsibilities of the school council. Nevertheless, it must be regularly informed of the budget, financials and any property-related projects of the school.

The presence – provided for by law – of two representatives of the management body on the school council, in an advisory capacity, can only improve the flow of information that is essential to the smooth running of the schools.

The principal's responsibilities, as set out above, may give the false impression that his/her role is limited to that of a director of studies. Yet, in schools with an “AEFE” agreement, his/her responsibilities are actually far broader. **The principal is the cornerstone of the system.**

## II.2 - The principal is the agent of the management body by virtue of the powers delegated to him/her

### II.2.1 - The “specific provisions” of the agreement

**The specific provisions of the agreement describe these delegated powers.**

The governing board will establish these powers in detail through its deliberations. They will then be formally set out in a written decision. It is recommended that the principal receive delegation by the governing board in particular for the preparation and implementation of the budget, as well as for the management of locally hired personnel.

The need to specify in writing the delegated powers granted to the principal by the management body is explicitly set out in Article 5 of the agreement. This recommendation is not always respected, however, as agreements too often simply reproduce the standard text in full.



**In the event the agreement does not include delegated powers of this type, further discussion is advised on the basis of the principles set out hereafter.**

### II.2.1.1 - Preparing and implementing the budget

The spirit of the agreement signed with the AEFÉ is for the principal to work in liaison with the treasurer and the chair of the management body on the draft budget, and not solely the teaching-related expenses. In this matter, the principal must involve the consultative bodies (school councils) in the formulation of pedagogical proposals.

Whenever possible, the deliberations of the management should be organized in three stages:

- The first to set out the general policy framework,
- The second for the supervisory team and treasurer of the management body to conduct technical preparation of the budget,
- The third to ensure that the suggested budget complies with the general policy framework set out previously. This budget is then submitted for adoption.

In order to clarify the respective areas of competence of each party, a distinction must be made according to whether the school has an administrative and financial officer (DAF) appointed by the Agency or not. If so, it is the role of the DAF to submit the draft budget to the governing board with the treasurer of the managing association. If not, the principal carries out this task.

Should the Agency representative consider any of the provisions to be detrimental to the interests of the school, he/she will ask the governing board to re-examine the draft budget and inform the AEFÉ's main office. The Agency will then decide whether the disagreement justifies that an expert AEFÉ task force be dispatched on site, led by either a regional coordinator delegated by AEFÉ executive management, or by the AEFÉ's school analysis and consultancy unit.

In all cases, the Agency must render a preliminary opinion before any major decision can be taken (in particular relating to property).

To implement the budget, the principal must have responsibility for incurring expenditure and recording revenue, particularly if he/she is assisted by an administrative and financial officer (DAF) appointed by the Agency. For this reason, it is advisable for the “specific provisions” of the agreement to include a stipulation that delegates this responsibility to the principal within the limit of budget allocation. When the principal is in charge of this area of competence, he/she is required to regularly report to the management body. If the Agency has not appointed a DAF or if an administrator is recruited by the management body, he/she is also considered as a collaborator to the principal who must enable him/her to exercise his/her administrative responsibilities in full.

On the recommendation of the chair, the governing board will set the threshold below which the principal holds sole responsibility for decision-making – to facilitate day-to-day management – and above which the decision must be shared (with the treasurer or the chair). This delegated competence will exclude multi-year contracts and capital expenditure.

In the same spirit, the principal's scope of action for implementation of the budget should be precisely determined in written procedures.. To this end, principals will be encouraged to work with management body representatives on drafting procedural manuals. Obviously, the writers of this type of document can draw upon the experience of other management bodies, as well as on the work of the Agency's school analysis and consultancy unit. Consultation will be organized for this document, which must comply fully with the provisions of the agreement.

**This approach has a twofold advantage:**

- it details the role of each actor in the various aspects of day-to-day management (purchasing, recruitment, payment, receipts, etc.), adapting the principles set out in the “specific provisions” of the agreement, and detailing procedures for implementation;
- it contributes to continuity in management, a real advantage in a context where the turnover of people in charge may be high. If the management body gains new supervisory entities, or if a new principal is appointed, the newcomers will naturally refer to the existing procedural manual. This will avoid any reinterpretation of respective roles, which could be a source of conflict.

### II.2.1.2 - Managing locally recruited staff

**The division of responsibilities must be clear.**

**Following consultation with the principal, the management body establishes a job grid, i.e. a list of positions and functions.** This task is in full keeping with its responsibility for managing the payroll, a key component of the budget.

The principal submits the best candidate for the job to the board chair, who alone signs the contract in his/her capacity as employer. This proposal follows a transparent, collegial selection process: advertising, application review and interviews with candidates by the competent consultative body (including a representative of the management body and personnel representatives) – as expressly set out in Article 7 of the agreement. This procedure applies to all faculty and non-faculty positions. Similarly, the procedure for dismissal must be formally set out as part of a process that involves the principal and requires that the competent consultative body be consulted as well.

In some schools, the “specific provisions” of the agreement expressly state the appropriate, balanced solution to be implemented. They specify that “the principal evaluates staff, reports on their work, and suggests bonuses or sanctions that may include dismissal”.

**Under no circumstances should the principal sign or even co-sign the employment contract or letter of dismissal.** Only the chair of the governing board is legally competent to hire or dismiss employees. **Further, as part of workplace negotiations,** it is strongly recommended that a commission be created, to be chaired by the principal, with a format determined by each school. The commission includes members of the management body, administrators and staff representatives. The areas of competence of this commission include issues relating to working conditions, health and safety, compensation, social security and any issue relating to human resources management. It functions in an advisory capacity.

### II.2.1.3 - Managing staff appointed and paid by the AEFÉ

Article 6 of the standard agreement expressly stipulates that the Agency holds sole responsibility for

managing its own employees. Under the terms of the circular of 26 June, 2002, the AEFE has a range of resources tailored to the various situations encountered.

In accordance with the provisions of Article 6, these employees are under the authority of the principal and the French ambassador, representing the Agency. They are employed not by the management body but by the AEFE.

In compliance with French public-sector legislation, government employees assigned to a school by the AEFE cannot be disciplined either by the Agency or by the management body. Following consultation of the joint committees, only the French Ministry of Education can order the unsatisfactory employee back to France.

## II.2.2 - The administrative and financial officer (DAF)

**To conduct his/her tasks in full, the principal may be assisted by an administrative and financial officer.**

### II.2.2.1 - A management team

Managing a French school abroad supposes considerable skills in terms of adaptation and cultural transformation on the part of the principal in order to meet his/her new responsibilities. Nevertheless, he/she must be supported by a colleague with technical skills, able to provide advice, and to implement decisions. The decision to create the post of a DAF contracted by the Agency is taken jointly with the management body. This implies that the school is of sufficient size to justify the cost of this employee for the AEFE.

### II.2.2.2 - An assistant to the principal and an advisor

When an expatriate or resident DAF is appointed by the Agency, he/she becomes **the principal's assistant in fields relating to administrative, financial and material management as well as human**

**resources.** The DAF is also permanent advisor to the management body, contributing to facilitation, management dialogue, and compliance with regulations. The DAF is a member of the management committee, but without voting rights.

**As part of the powers delegated by the management body to the principal, he/she is in charge of the following, under the principal's authority:**

- assisting in budget preparation,
- overseeing management of the schools' material resources,
- keeping administrative and material accounting,
- introducing cost accounting components,
- developing financial analysis components and decision-support tools,
- taking part in defining human resources policy and conducting implementation.

**He/she is directly delegated by the management body to:**

- keep general accounts,
- collect revenue,
- manage funds (investments),
- pay suppliers (set limits above which he/she cannot make decisions alone). In the case of an expatriate or resident administrative and financial officer (DAF), formal delegation is required.

The management body must ensure that the DAF has sufficient human and material resources to carry out his/her work.

At this stage, it may be useful to draw attention once again to a key principle: the principal is not the main order-giver. He/she has a delegation, usually within set limits, to incur the expenditure provided for by the budget. **Legal responsibility for paying suppliers or collecting school fees lies with the chair and treasurer of the management body.** The treasurer, in compliance with the articles of the management bodies, is responsible for keeping accounts.

If there is no DAF, the Agency requests that the principal should not receive delegated powers for payment or disbursement. This delegation may be granted to an employee in the school's accounting department. This means that in terms of payment, collection and account-keeping, it is advisable for procedures, which should be clearly set out in the procedural manual, to highlight the responsibility of the treasurer (delegation, signature) and that, as much as possible, an accounting employee should be responsible for these operations.

By respecting these principles, it will be possible to maintain a clear separation between the incurring of expenditure by the principal, who has discretionary power in this respect, and the accounting operations conducted by the financial department, which involve the legal responsibility of the management body.

**A system for double-checking financial operations** has been adopted by a number of schools:

- with respect to orders: signed by the chair and treasurer after approval by the principal or administrative and financial officer (DAF).
- with respect to payment: signed by a person authorised to incur expenditure (the principal or his/her representative) and by a person authorised to make payments (the treasurer or his/her representative). The objective is for this simple internal control procedure to be brought into general use.

## II.3 - Relations with the Agency

**The principal and the administrative and financial officer (DAF) appointed by the Agency are AEFÉ employees.**

### II.3.1 - An entirely new role

Most of the time, before taking up an appointment in a foreign country, the principal and DAF are



familiar only with the governing boards of public-sector schools in France. Relational and management skills are necessary qualities to oversee these schools as well. Accordingly, they are recruited by the Agency on the basis of their success in their previous jobs, following a highly selective procedure. Their role in a French school abroad will be new, since they will be working in a completely different institutional and cultural context.

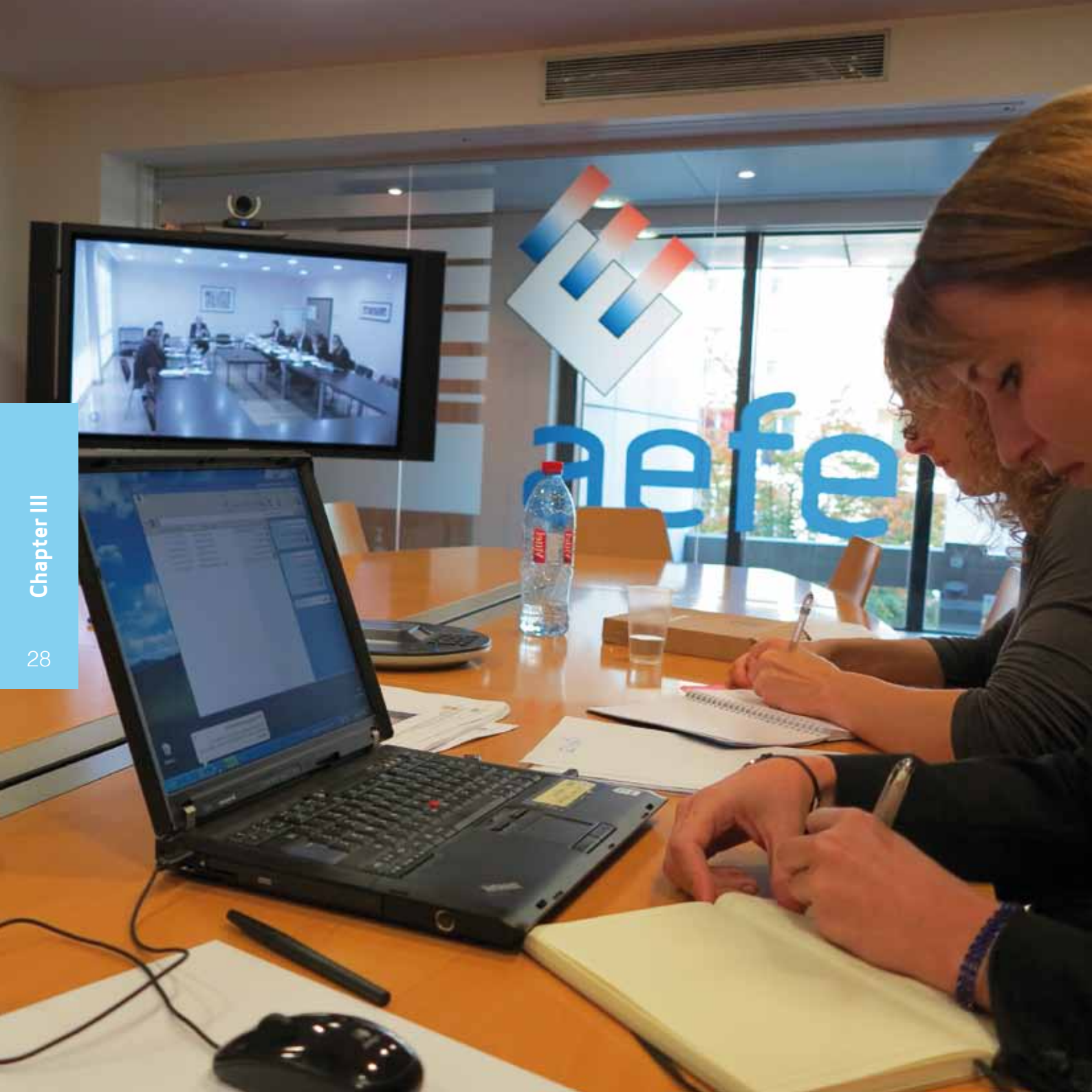
To facilitate this necessary change of culture, the administrators in charge of French schools in the AEFÉ network will receive training on the new aspects of their job prior to their departure. Their training will include details on the responsibilities of both partners.

### II.3.2 - Responsibilities as AEFÉ employees

**The principal and the administrative and financial officer (DAF) must be informed of their responsibilities as Agency employees.**

The Agency expects them to safeguard its interests through their behaviour beyond their specific and delegated areas of competence (see paragraph 1 – 2 with respect to this point).

The principal appointed to run a French school abroad also becomes an employee of the ambassador. He/she represents France in his/her field. This responsibility is one of the sensitive aspects of his/her mission. Careful attention must be given to the local context. He/she will maintain close, ongoing links with the diplomatic representative in order to manage and avoid any difficulties linked to the integration of the school in an environment different to that experienced by the principal in his/her former responsibilities.





## › **Transparency, financial reports and inspections**

## III.1 - The provisional budget

The provisional budget must be sent to the AEFÉ in accordance with a specific accounting chart, and it must comprise remarks from the principal and the administrative and financial officer (DAF), based on a grid supplied by the Agency.

## III.2 - Retrospective financial documents

The question of retrospective financial documents is more complex.

### III.2.1 - Accounts of the management body

The accounts of the management body are kept in accordance with local accounting standards (Article 4 of the agreement). The conformity of the accounts must be certified by an outside accounting firm that is recognized as meeting high standards of expertise and rigor. However, accounts must be presented according to French standards in the case of management accounts submitted to the Agency (in simplified form for smaller schools).

The choice of accounting firm is the responsibility of the management committee.

### III.2.2 - Checks by the Agency

Checks conducted by the Agency concern parameters that shed light on account management quality. These controls play a significant role in the partnership. Financial decisions are made by the management bodies, legal entities that are independent from the Agency. The Agency delegates to them the public service mission assigned to it by French law. As part of this, the Agency provides them with resources that are often substantial from both a human standpoint (supervisory staff, payment for

teachers with tenure) and financial standpoint (grants and scholarships).

The Agency has set up an analysis and consultancy unit responsible for expert appraisals of schools. It may also resort to external assessments.

### **III.3 - The continuity principle**

For purposes of transparency, the formal definition of procedures, and service continuity, each member of the supervisory team must have put together, by the end of his/her assignment, a file including as much detail as possible on the situation of the school in his/her field of activity.

#### **III.3.1 - The principal**

His/her file must include the following as a minimum:

- review to date of the school project.
- the situation in terms of human resources management and a review of workplace negotiations.
- where applicable, a progress report on property projects.
- copies of the agreement, articles, implementation guide, procedural manual.
- any other documents useful to understanding how the school works.

#### **III.3.2 - The administrative and financial officer (DAF)**

This file must include the following as a minimum:

- financial statements: expenditure incurred and budget revenue, provisions, outstanding amounts to be paid or recovered, development of account balances, accounting balance sheets.
- cash flow reports: bank reconciliations and receipts.

- conclusions of the last known account auditing and certification report.
- description and functional organizational chart of the financial department.

These files are compiled in close consultation with the management body represented by the chair and the treasurer in order to facilitate a harmonious transition between management teams.

The regional AEFE coordinator, when there is one, and Agency headquarters must be informed of any difficulties encountered in preparing these documents. A copy of this file, signed by the partners, will be sent, via the French Embassy to the relevant regional department at AEFE's main office.

## III.4 - Inspections

As set out in article 4 of the agreement, to ensure transparency and information for partners, and to verify the quality of teaching in the school, or the correct use of human and financial resources, inspections may be carried out by the various inspection bodies of the French Ministry of Education. .

Read and understood:

Date

**For the management committee**

**For the school administration**





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