



Woodfarm High School

Devolved School Management

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Background and Legislation

Introduction

Devolved School Management (DSM) was introduced in 1993 by the Scottish Executive; requiring Local Authorities to devolve 80% of school budgets to Head Teachers to give them the autonomy to make decisions regarding resource allocation and priorities, subject to local consultation.

Since then, DSM guidance has evolved to reflect the changing landscape within which schools operate.

Budgets within DSM are only one part of the overall financial management of the Local Authority Education Department. It is important to recognise that there is a strong relationship between devolved and non-devolved budgets in maintaining a sound and robust financial strategy for the Education Department and the Local Authority.

A range of factors need to be considered in determining the optimum model for the devolvement of budgets to schools to ensure that best value is achieved and that Head Teachers are empowered to achieve the best possible outcomes for children and young people.

It is important to note that DSM procedures set out the rules and principles in which schools operate in normal circumstances. However, should there be exceptional circumstances, for example the impact of changing financial circumstances during the course of a financial year requiring measures to be taken to ensure the department's overall expenditure is controlled, it may be necessary to temporarily amend the rules of DSM. Any such decisions would be done so at the discretion of the Director of Education and discussed with the Head of Accountancy (Chief Financial Officer) and Chief Executive. Head Teachers would be advised of such intent as early as possible, with the implications of such a decision clearly identified and explained. Additional funding would then be devolved to schools for Head teacher to manage appropriately.

It is the responsibility of the Head Teacher, supported by Business Support Managers, to ensure effective management of financial and other resources for learning and teaching. This includes ensuring effective budgetary control. Budgets are issued to all departmental faculty heads and whole school budget is presented to SMT monthly.

Scheme of Delegation

A Scheme of Delegation has been produced to clearly identify specific responsibilities in relation to the administration and management of school budgets.

Each budget line is identified by a six digit numeric code, which is common to systems used in Finance and other departments of the Local Authority. A brief title or description for each delegated budget line follows in the next column of the document. The basis of the allocation is then described, e.g. a flat rate, plus a per pupil allocation or a previous action spend.

The ability to move monies from one budget line to another –virement – is permitted on most budget lines subject to the maintenance of minimum provision. Generally virements of up to £5,000 are at the discretion of the Head Teachers without the need for further external reference. In most budget lines, proposals to vire individual sums beyond that limit and up to £20,000 are subject to consultation with the Director of Education/Head of Service. All virements must be sent to the Budget Unit for processing after they have been agreed and signed by the Head Teacher.

Carry forward balances of surplus budget was introduced at the end of budget year 2017/18. This figure was introduced as 5 % of DSM budget reducing to 3.5 % in budget year 2018/19. Carry forward balances must be utilised within 3 years.

Policy and Aims of Policy

Operation and management of school finances are thus implicated in the priority to deliver a suitable learning environment using the budget and resources made available. The Head Teacher and Senior Management meet with the Business Support Manager on a monthly basis. The DSM committee hold monthly meetings to discuss both devolved school budgets and the Woodfarm School Fund. Faculty Heads are issued with budget updates monthly.

The purpose of monthly DSM committee meetings is to provide transparent information on school finances and how they are managed. All staff are invited to join the DSM committee and expressions of interest are requested on an annual basis.

The aim of DSM is to provide adequate levels of resourcing across the whole school to provide for operational needs. Effective operation of school finance provides a mechanism for successful delivery of the curriculum.

Allocation of Resources and Management

Reprographic Funding

Reprographic charges are applied to Faculties on a monthly basis. At the start of the financial year, Heads of Faculty are asked to top slice a budget from the Faculty per capita allocation to cover expected reprographic costs for the session.

Improvement Plans

Faculty Heads of Departments can apply for additional funding via their Faculty Improvement Plan. Approval is at the discretion of the Head Teacher.

DSM

Additional budget funding can be requested from the DSM committee. Per capita funding is used for learning and teaching resources. However, if there is a requirement to purchase an item or fund an activity which would deplete resources or would provide a specific additional learning resource Faculty Heads can apply to DSM .Discussion with link Depute Head Teacher (DHT) is required prior to submission of the funding application (See Appendix 1 for DSM application form).

Committee members include Head Teacher, the Depute Head Teacher who has been allocated the DSM remit, the Business Support Manager and School Fund treasurer. Staff members are invited to join committee on an annual basis and it is preferred that a Faculty Leader joins. Information regarding the school budget is discussed at meetings and committee members can contribute to the decision making. Meetings are vital to ensure transparency of budget expenditure is available to all staff.

School Funds Committee

School Fund committee members include Head Teacher, Depute Head Teacher and office bearers. A treasurer is appointed to record all financial transactions

and minutes are taken on a rota basis by all committee members. All staff are invited to join the committee on annual basis.

The committee members are required to be updated on the constitution and annual submission of financial records to East Renfrewshire Council budget unit must be completed by the end of November each year.

Support for Quality Education (SQED)

The SQED budget (or Head Teacher's budget) is allocated and managed by the Head Teacher. Spending is based on a bid process, which differs from that of the Improvement Plan, where Faculty Heads can request extra money to meet specific targets. All SQED bids are considered by contacting the Head Teacher directly, providing full details of funding requests.

Details of expenditure are provided to SMT at the monthly budget meetings and information is also available to the DSM committee.

Parent Partnership

The Parent Partnership Committee works in partnership with the school management team and are formed and operated within their own constitution. Fund raising activities provide funding to the school and donations are provided following consultation with the Head teacher, SMT and staff members.

Building Adaptations

For major capital works, funding is allocated to the school via the Education Department. For minor adaptations, funding is approved by the Head Teacher and SMT.

Operational Budgets

The school is allocated devolved budget lines to fund operational activities within the school such as mail contract, telephone call and landlines, office equipment, TV licenses and office stationery. The budgets allocated are vital to the day-to-day operations of the school and virements are required where an

overspend is evident. The school janitor is allocated a budget to purchase cleaning and hygiene supplies.

Furniture and Fittings

A small budget is allocated to the school for furniture and fittings. Allocation is based on priorities for an excellent learning & teaching environment.

Invigilators

The school is not allocated a budget for invigilators and the Head Teacher is required to fund this for Senior Phase prelim exams. Invigilation for SQA exams are centrally funded.

Replacement Teacher Budget

The school is allocated a replacement teacher budget to cover short term absences of less than 20 days. This budget can also be used to fund supported study activities. This budget is managed in line with the Local Authority Maximising Attendance procedures.

Library Resources

An allocation is given to the school to purchase resources.

CLPL / Cluster Budgets

CLPL and Cluster budgets are allocated to the school during the year and are not guaranteed. Expenditure, if not funded, requires to be met by the Head Teacher.

PEF

The Pupil Equity Fund (PEF) is additional funding which can be issued to schools from the Scottish Government. Funding is used to close poverty related attainment gaps and funds are spent at the discretion of the Head Teacher. Allocation of funding is discussed with SMT, a selection of Faculty Heads and the Business Support Manager at a specified meeting. Teaching staff can expect to participate in dialogue outlining the proposed impact of funding;

their role is valuable as they give a rounded view and can debate what is likely to have most impact for pupils in this category. Teacher voice is important and valued: staff members can advise and assist the SMT and transparency is apparent in how and why the funds are allocated. PEF funding guidelines are adhered to when allocating funds and the Head Teacher is required to submit a report on expenditure and how it has contributed to raising attainment.

Monitoring and Review of Policy

The DSM policy review will take place annually following the end of the financial year and will be carried out by the Business Support Manager and presented to the Head Teacher and SMT.



Appendix 1

Date: August 2019

Review: June 2020

UNCRC Article 3

All adults should do what is best for you. When adults make decisions, they should think about how their decisions will affect children.

Woodfarm High School DSM Committee: Request for Funding

Department/ Area of school: _____ Date: _____

What is being requested? This should be described in detail/ itemised with individual costs.

Cost: _____

If you are requesting funds for a trip please provide the following information:

Venue: _____ Date of trip: _____

Cost of transport: _____ Pupil contribution: _____

Are there any on-going costs? YES / NO

If yes, what are these: _____

Has it been discussed at a faculty Meeting? YES / NO

Is it contained in the Faculty improvement Plan: YES / NO

Justification (E.g. benefit to pupils/staff/school)

Signed by Faculty Head:

Return to F Johnston DHT