

# POLICY ON **MAXIMISING** RESOURCES **THE USE OF**



# POLICY ON MAXIMISING THE USE OF RESOURCES



## Rationale

**Education Resources is committed to providing the highest possible quality of services for children, young people, parents, other adults and local communities. Maximising the use of resources underpins this overall aim. The purpose of this policy statement is to ensure:**

1. A common understanding among employees of the term 'resources'
2. Effective strategic management of resources, reflecting national, Council and local priorities
3. The management of resources reflects the needs of children, young people, adults and local communities, and promotes access to opportunities for all
4. Sound management of finances available to support service delivery
5. Education Resources recognises and values the contribution made by employees in achieving its strategic objectives, and therefore recognises the need to inform, consult and develop employees to enable them to effectively maximise the use of resources
6. Educational services are delivered within safe and accessible environments suited to the purpose
7. The effective provision of utilities, and transport to support Education Resources activities
8. Best use is made of the materials, apparatus and equipment available to support teaching, learning and the delivery of educational services

## The components

**The establishment of an overall approach to maximising the use of resources is essential to ensuring consistency and coherence across all services. The main components of the overall approach set out within this policy statement are:**

1. A Definition of Resources
2. Strategic Management of Resources
3. Meeting Needs and Promoting Access to

4. opportunity
5. Financial management
6. Employees
7. Safe and accessible environments
8. Utilities and transport
9. Equipment, materials and other resources

## SPECIFIC OUTCOMES

**The overall aim of this policy is to ensure that the main components of the Education Resources approach to maximising the use of resources are in place in all establishments and services. More specific outcomes related to each of the components are presented below**

### 1. A definition of resources

#### Outcome

The use of a common definition of the term 'Resources'

The definition of Resources used in this policy is:

The various means by which the delivery of education and all associated services is supported within South Lanarkshire through the contribution of:

- Parents and other adults
- Children and young people
- Employees
- And the effective use of:
  - Finance
  - Properties and environments
  - Equipment and materials
  - Information and knowledge

#### Roles and responsibilities

All employees are aware of the Education Resources definition of Resources. The definition should be used in the development of procedures and practice in establishments and services.

### 2. Strategic management of resources

#### Outcomes

- Resources are allocated in line with national and council priorities.
- Strategic management decisions taken by the Education Management Team reflect

national, council and local priorities

- Strategic management decisions are appropriately communicated to employees, parents, children and young people, other adults and local communities
- Strategic decisions are understood by employees and effectively implemented
- Strategic management decisions are taken reflecting the council's policy on partnership working and consultation

#### Roles and responsibilities

The Education Management Team ensures:

- Employees are familiar with strategic decision making processes
- Strategic decisions are appropriately communicated to employees and other stakeholders.
- The Education Resources plan and action plans reflect council and national priorities.

Heads of establishment and managers ensure:

- Resource management decisions reflect the council's standards for corporate governance
- Employees, parents, children and young people, other adults and local communities are appropriately informed of strategic decisions.
- Development plans reflect council and national priorities for their sector

Employees ensure:

- They are familiar with the main Council and national policy priorities for their service or sector.
- They are familiar with the priorities in the Education Resources Plan.

#### Resources

- The national priorities for education
- The Education Resources plan
- Service action plans
- Establishment development plans

### 3. Meeting needs and promoting access to opportunity

#### Outcome

- Education Resources is committed to achieving equality in access to education and related services for all service users and employees
- Education Resources complies with relevant legislation, develops good practice and promotes equality.

#### Roles & responsibilities:

The Education Management Team

- Ensures compliance with relevant legislation, codes of practice and good practice guidelines.
- Promotes equality through service planning, performance monitoring and the implementation of best value.
- Publishes improvement targets related to equality.
- Encourages active partnerships internally and externally to foster equality of opportunity.
- Assesses the accessibility of services and takes appropriate remedial action.
- Ensures the commitment to equality is communicated to service users and employees.

# POLICY STATEMENT

## Maximising the use of Resources

- Promotes a positive and inclusive climate in which individual needs and differences are valued.

### *Heads of establishment and managers:*

- Ensure service activities comply with relevant legislation, codes of practice, and council policy.
- Ensure the principles of equality are reflected in service planning, performance monitoring and best value reviews.
- Ensure effective consultation and partnership working.
- Take action to communicate the commitment to equity and equality to all service users and employees.
- Take action to tackle instances of discrimination, harassment or similar inappropriate behaviour.

### *All employees:*

- Support and contribute to the promotion of equality in the delivery of services.
- Are aware of how to challenge or deal with instances of service practice or behaviour contrary to these principles.

### *Resources*

- South Lanarkshire equal opportunity policy
- "Dignity at work"
- The code of conduct
- Stronger together the community plan for South Lanarkshire
- Education Resources policy statement on inclusive education and support for learning
- The race equality action plan

## 4. Financial management

### **Outcome**

- Financial resources are effectively managed.
- Best value is achieved in the delivery of Education services.
- Sources of funding are maximised.

### *Roles and responsibilities*

#### *The Education Management Team:*

- Co-ordinates the preparation of bids for external/targeted funding

#### *Budget managers:*

- Are familiar with the appropriate approved policies and financial regulations and should understand the grant aided expenditure assessment mechanism for distribution of funding to councils.
- Are aware of, and apply the procedures for dealing with external funding and targeting available funds.
- Plan, monitor and control their budgets
- Ensure spending reflects statutory requirements, council policy, the education resources plan, service action plans and establishment development plans.
- Ensure provision is made for long-term sustainability of new revenue projects, and the ongoing revenue implications of capital projects.

#### *Head teachers:*

- Are aware of their delegated powers under the scheme of delegation for devolved school management (DMS).
- Understand the funding distribution formulae for individual school budgets, and the

requirements associated with ring-fenced funds.

#### *The education finance services unit:*

- Co-ordinates budget preparation, monitoring and reporting in accordance with the corporate requirements of the council and the scheme of delegation for DMS.
- Provides regular management information, specialist advice and training for budget managers.
- Provides appropriate systems and control mechanisms to budget managers to secure effective financial management.

#### *Finance and IT Resources:*

- Provides a strategic overview of financial issues
- Co-ordinates consolidated budget preparation, monitoring and reporting processes
- Provides corporate financial services in respect of payroll, payments, treasury functions, financial accounting, risk management and internal audit.

### *Resources*

- Revenue and capital budgets
- Education Resources plan, development plan, action plan
- Financial regulations
- Scheme of delegation for devolved school management
- Operating procedures
- Finance services unit procedure notes (FSUPN)
- SEEMIS
- DMS helpline

## 5. Employees

### **Outcomes**

- Employees are deployed in line with approved staffing standards and establishment staffing levels.
- Employees have the relevant training and development to enable them to contribute effectively to the work of education resources
- Employees contribute to the effective delivery of services.

### *Roles and responsibilities*

#### *The Education Management Team:*

- Ensures the contribution of employees is valued and their specific training needs are identified and met.
- Supports achievement and retention of the Investors in People standard.

#### *Heads of service:*

- Identify the training and development needs of employees to enable them to contribute to the work of education resources.
- Produce a strategic staff development plan to ensure employee training and development needs are met in a cohesive and focused way.
- Ensure the council's commitment to Partnership working is fully implemented.

#### *Education personnel services unit provides:*

- Advice and support on all aspects of employment including recruitment, conditions of service, maximising

attendance, employee relations and involvement, etc.

- Regular workforce monitoring reports.

#### *Corporate Resources:*

- Provides advice on council wide employee related matters
- Co-ordinates corporate personnel initiatives
- Provides specialist advice on personnel related matters

#### *Heads of establishment and managers:*

- Ensure the effective deployment of employees.
- Ensure all employees are aware of how they can contribute to the effective implementation of this policy.
- Encourage participation, partnership working and innovation in respect of maximising resources.
- Ensure employee development and training needs are identified and met.
- Share information with employees and encourage their involvement in supporting improvement
- Ensure appropriate action to improve performance.

#### *All employees:*

- Take the opportunities provided to learn about this policy, its principles and objectives.
- Participate in agreed development activities.
- Participate in opportunities for partnership working.
- Effectively use resources to meet the needs of service users.
- Identify areas within their remit where improvements can be made, and where possible, participate in developing effective solutions.
- Contribute to the implementation of any changes designed to maximise the use of resources.

### *Resources*

Employment policies and strategies including:

- The "Investors in People" standard
- Staff development and review
- Employee development policy
- Competence initiative
- Recruitment policy
- Communications strategy
- TU partnership agreement
- "Maximising Attendance"
- "Dignity at Work"
- Equal opportunities policy
- Operating procedures
- Personnel Services Unit Procedure Notes (PSUPN)
- Code of conduct
- Management bulletins

## 6. Safe and accessible environments

### **Outcomes**

- Education Resources activities are undertaken, as far as is reasonably practicable, within safe accessible environments suited to the purpose.
- The requirements of the disability discrimination act are met.
- The requirements of legislation and regulations relating to health and safety are met

- The use of accommodation and premises is maximised for learners and the community

#### *Roles and responsibilities*

##### *The Education Management Team:*

- Ensures the effective implementation of the council's health and safety policy

##### *Heads of establishment and managers:*

- Promote a positive attitude to health and safety
- Ensure appropriate risk assessments are carried out
- Co-ordinate the management of health and safety
- Ensure that health and safety guidance is followed
- Fulfil duties of property responsible person
- Ensure the effective use of accommodation

##### *Support Services:*

- Co-ordinates the dissemination of health and safety guidance
- Monitors occupancy and usage levels

##### *Finance Services Unit*

- Monitors investment programmes for capital, planned maintenance and security projects

##### *The Advisory Service:*

- Provides subject specific advice and guidance in relation to health and safety

##### *All employees*

- Contribute to effective health and safety management

##### *The health and safety unit:*

- Develops policies and procedures
- Provides advice and guidance
- Prepares monitoring reports

##### *Housing and Technical Resources:*

- Provides repairs service
- Acts as client agent for all construction projects
- Provides project monitoring service through the Property Investment Manager(PIM)

##### *Community Resources:*

- Provides cleaning, grounds maintenance, janitorial and catering services
- Maximises use of accommodation in line with the letting policy

##### *Resources*

- Health and safety policy statement
- Safety manual
- Master safety file
- General safety file
- Subject specific safety files
- Operating procedures

- Health And Safety Procedure Notes (HASPN)
- Management bulletins
- Health and safety at work act
- The disability discrimination act
- Health and safety unit helpline
- Repairs call centre
- Facility log book

## 7. Utilities and transport

### **Outcomes**

- The efficient and effective use of energy, water and telecommunications
- Safe and appropriate transport is provided in terms of the council's policy and legislation

#### *Roles and responsibilities*

##### *The Education Management Team:*

- Ensures the effective provision of utilities and transport in line with council policy

##### *Heads of establishment and managers:*

- Ensure appropriate use is made of utilities

##### *Support Services:*

- Allocates mainstream school transport places
- Co-ordinates approval of contracts
- Links with Strathclyde Passenger Transport (SPT)

##### *Strathclyde Passenger Transport Executive:*

- Acts as agent for provision of mainstream school transport

##### *Specialist Services:*

- Arranges contracts for SEN transport in terms of legislation and council policy

##### *Community Resources:*

- Manages and maintains fleet vehicles for use in education services

##### *Housing and Technical Resources:*

- Provide utility management services

##### *Resources*

- Agency agreement with SPT
- Conditions of contract for school contracts

## 8. Equipment, materials, and other resources

### **Outcomes**

- Materials, apparatus and equipment are appropriate to the demands of the curriculum and the age, stage and needs of learners and service users
- Best value is achieved in the purchase of materials apparatus and equipment
- An inventory of apparatus and equipment is maintained

- The requirements of regulations relating to maintenance and repair of equipment are met

#### *Roles and responsibilities*

##### *Heads of service, heads of establishment and managers:*

- Ensure that standing orders relating to contracts for procurement of goods and services are followed
- Ensure the procurement of all materials, apparatus and equipment meets the requirements of education resources.
- Ensure all employees are aware of their role with regard to procurement and inventory keeping.
- Ensure appropriate testing, maintenance and repair of equipment
- Implement systems to monitor the management and use of materials apparatus and equipment.
- Ensure appropriate action to secure improvement in the management and effective use of materials apparatus and equipment.

##### *All employees:*

- Make effective use of materials apparatus and equipment
- Actively contribute to the implementation of any changes designed to maximise the effective use of materials apparatus and equipment.

##### *Resources*

- SLC standing orders relating to contracts
- SLC Contracts
- Authorities Buying Consortium (ABC) catalogues
- Operating procedures
- SEEMIS
- DMS procedures guide

### **Review**

This policy will be reviewed every two years. The next review will take place by March 2005

### **Further Information**

For further information or to enquire about having this information supplied in an alternative format or language, please contact 01698 454545, The Head of Finance and Personnel Education Resources Council Offices Almada Street Hamilton ML3 OAE or email [education@southlanarkshire.gov.uk](mailto:education@southlanarkshire.gov.uk)

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Education Resources

# POLICY STATEMENT

## Maximising the use of Resources