Devolved School Management Scheme 2022

Inspire, Transform, Strengthen

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1. Introduction

1.1. Introduction to South Lanarkshire Council

South Lanarkshire Council is the fifth largest local authority in Scotland, with a population of over 316,000 people. It has an annual revenue budget of £795.527m in 2021/22. It is allocated across Education, Social Work, Housing and Technical Services, Community and Enterprise, and Finance and Corporate Resources; the council's five Resource areas.

The council provides services for everyone in the South Lanarkshire area. The council plan Connect 2017–2022 considers the key issues affecting the council, its communities, partners and individuals as well as other external influences.

Connect 2017–2022: www.southlanarkshire.gov.uk/connect

Education Resources is one of five Resources delivering services and supporting communities in South Lanarkshire.

1.2. Education Resources

Education Resources is responsible for 124 primary schools, 17 secondary schools and 7 additional support needs schools. These are grouped into 17 learning communities across the four main areas of South Lanarkshire:

- Cambuslang and Rutherglen
- Clydesdale (Biggar, Carluke, Lanark and Lesmahagow)
- East Kilbride
- Hamilton

Over 45,000 young people attend primary, secondary and additional support needs schools in South Lanarkshire with our school population increasing. We have invested in our schools to meet our future needs and our school estate is now fully modernised and varied, encompassing both rural and urban schools of varying size and deprivation indices. We have denominational and non–denominational schools and a Gaelic unit in primary and secondary sectors.

Our Resource is also responsible for learning communities, early years and youth family and community learning services, inclusion and psychological services as well as centrally based teams that provide support to schools **(see section 7 Professional Support).**

The funding we receive from the Scottish Government closely links to pupil numbers, teacher numbers and deprivation indices, and in turn the funding devolved to individual schools for staffing and supplies also takes account of these factors.

Sector	Pupil Numbers	Teacher Numbers (FTE)
Secondary	20,075	1,634
Primary	24,852	1,696
Special	467	150
Centrally Employed	–	–
	45,394	3,480

Source: September 2021 Annual School Census
FTE = Full Time Equivalent

Education Resources Resource Plan

Education Resources publishes an annual Resource Plan setting out its objectives and priorities for the year ahead. The Resource is focussed on supporting learning, recovery and renewal and to ensure that our children and young people continue to be provided with learning pathways which will enable them to progress, develop their skills and enhance their wellbeing through interaction with their peers.

The 2021/22 Resource Plan this year will focus on the steps for recovery and is designed around the following: –
- Continuing to deliver education in a safe environment;
- Supporting wellbeing;
- Focussing on the curriculum, learning and assessment to meet the needs of all learners, with a particular focus on closing the poverty related attainment gap; and
- Maximising digital inclusion.

The Resource will also take account of the recommendations and outcomes arising from a number of national reviews, for example, on the impact of poverty on attainment; empowerment; and the highly influential reports on Scottish education from the International Council of Education Advisers (ICEA) on equity and excellence, and the findings from the Organisation for Economic Co–operation and Development (OECD) on their review of Curriculum for Excellence www.oecd.org/education/scotland–s–curriculum–for–excellence–bf624417–en.htm

At a high level the Education Resources 'Strategy on a Page' sets out the priorities for all schools, educational settings and services. The aim is to inspire all learners, transform their learning experiences and strengthen the partnerships with parents/carers and families and agencies and services who support the learning and wellbeing of children and young people.

Strategy on a Page

Inspire/Transform/Strengthen #itsSLC

The strategy on a page outlines these priority areas in an easy to follow and visual way

Our Vision	Our Values
Improve the quality of life of everyone in South Lanarkshire.	- Focused on people and their needs - Working with and respecting others - Accountable, effective, efficient and transparent - Ambitious, self aware and improving - Fair, open and sustainable - Excellent employer
Our Purpose:	**Our priorities are to**
To raise achievement and attainment, inspire learners, transform learning and work in partnership to strengthen our communities	- Raise standards in literacy and numeracy and close the poverty-related attainment gap - Improve health and wellbeing not enable children and families to flourish. - Support children and young people to develop their skills for learning, life and work - Ensure inclusion and equality are at the heart of what we do
To take forward our priorities we will:	
- Provide high quality learning experiences for all - Deliver a meaningful curriculum to support the learner journey - Use evidence to effect improvement - Build leadership capacity within a strong framework of governance - Encourage innovation and creativity - Strengthen our partnership working	

The Resource has further identified the main challenges, risks and new developments which will have significant impact on the delivery of services in the coming year and beyond. These are outlined below:

- Covid–19 response and recovery
- Delivery of safe environments
- Health and wellbeing
- Curriculum, learning and assessment
- Digital inclusion and remote learning
- Early learning and childcare
- Communication and engagement

Education Resources Corporate Governance Statement 2020–21

Each year the Executive Director of Education Resources and Education Management Team agree and sign off the corporate Governance Statement, setting out the governance arrangements that are in place for the Resource. It confirms that the Governance Self–Assessment Checklist has been reviewed by the Heads of Service and approved by the Resource Senior Management Team and that controls are in place and working well.

This statement consists of five sections which provide a summary of current governance arrangements. The sections are as follows:-
Section 1 – General Governance Arrangements;
Section 2 – Internal Controls;
Section 3 – Information Governance;
Section 4 – Systems of Governance and Control; and
Section 5 – Assurance.

To ensure that our regulatory and statutory obligations are being met, the following controls are in place and are operating effectively in practice:–

- Chief Officer in post (Chief Executive);
- Chief Financial Officer in post (Section 95 Officer – Executive Director of Finance);
- Executive Director in post (Education);
- Monitoring Officer in post (Head of Legal Services);
- Senior Information Risk Officer (SIRO) (Director of Finance and Corporate Resources);
- Data Protection Officer in post (Legal Services Manager);
- Standards Officer and Depute in post (Integrated Joint Board);
- Business Continuity Plans;
- Resource Business Plans – Housing, Homelessness, Estates and Office Accommodation;
- Information Governance Board, Good Governance and Risk Management Groups;
- Internal Audit function including Fraud Management;
- I.T. Security, Policies and Standards;
- Financial Management Framework;
- Political Management documents including standard orders;
- Annual Resource Planning process
- Performance Management Framework with reporting through IMPROVe;
- Risk Management function including Housing and Technical Resources Risk Register;

- Community Planning structures and processes;
- Partnership Working arrangements;
- Community Planning structures and processes;
- Corporate Workforce Planning;
- Resource/Service Workforce Planning;
- Staff and Elected Members Codes of Conduct;
- Health and Safety;
- COVID–19 Resource Wide Recovery Plans and Restart Framework;
- External regulation and inspection – Scottish Housing Regulator and Care Inspectorate.

Controls and monitoring structures are in place to comply with all employee related policies. Furthermore, robust management information is prepared and reported to enable our elected members to make well informed transparent decisions about our services.

To further enhance the above controls, we are committed to continuous controls and service improvement and are delivering well against the recommendations of internal, external auditors and other external review agencies.

The Devolved Management Scheme in schools is a key document to ensure internal controls and governance of Education's resources are in place and being followed and sets out the arrangements for doing so.

1.3.   Objectives of the Devolved Management Scheme

The underlying objective of Devolved School Management is to enable decisions, relevant to the day–to–day management and provision of school education, to be made at local level. The Scheme of Devolved School Management provides the method of calculating how resources are allocated to schools on the basis of clearly defined allocation criteria.

Responsibility for determining how this budget will be allocated within the school however, rests with each Head Teacher, and the DSM scheme does not provide a prescriptive guide to how resources will be used within each school. This approach will ensure that schools are resourced in a fair and consistent manner, whilst ensuring that Head Teachers are empowered to deploy resources in the manner best suited to meet the needs of the learners in their school.

The DMS will continue to evolve in light of national developments regarding the governance of Education.

1.4.   Devolved School Management overview

Devolved School Management was introduced in 1993 to enhance and improve the management of resources at school level. The DSM guidance was reviewed in 2006, and again in 2012, taking account of the changing economic and financial climate for both Local Authorities and the Scottish Government. In June 2017 the Scottish Government consulted on changes to DSM as part of the wider *"Fair Funding to Achieve Excellence and Equity in Education" consultation.*

The updated DSM guidelines, published in summer 2019, seek to build and improve on the DSM Guidelines of 2012 and, critically, reflect and integrate with the Education Reform Programme and priorities emerging from the Scottish Government and COSLA Education Reform Joint Agreement of June 2018. These Guidelines can be found here bit.ly/DevolvedSchoolManagement

The Guidelines have been devised to help Local Authorities develop their own Devolved School Management (DSM) schemes. The new Guidelines aim to encourage participation from Local Authority wider teams, schools and parents.

They have been prepared through collaboration and consultation with a wide range of stakeholders. Collaboration is key to a successful local DSM scheme and this is captured within the Joint Agreement and Headteachers' Charter to which these guidelines align and support.

The expected and recommended outcomes of the new Guidelines that local authorities are expected to follow and implement, across nine broad areas, are outlined in **Appendix A.**

1.5.   Principles of Devolved School Management

The updated DSM principles, agreed by the Fair Funding Reference Group and building on and enhancing the foundations and principles of the 2012 guidance, are:
- Subsidiarity and Empowerment
- Collaboration
- Accountability and Responsibility
- Clarity and Equity

These principles reflect the National Improvement Framework aims of excellence through raising attainment and achieving equity. The principles also fully endorse those proposed in the Fair Funding consultation:
- **support excellence and equity** – ensuring every child and young person has the same opportunity to succeed
- **be fair** – placing the needs of all children and young people at the centre
- **be simple** – ensuing the costs of delivering education can be easily understood and explained and that schools are able to manage and plan ahead with certainty
- **deliver value for money** – ensuring that every penny spent is used effectively

1.6.   DSM 2022 Process of review

Following the release of the *Devolved School Management Framework Document – for Local Authorities* and the *Devolved School Management Guidelines* in June 2019; a review of the current scheme was undertaken to consider the delivery of a new Devolved School Management (DSM) scheme for Schools for implementation for school session commencing August 2021. This work was started in October 2019 with an original implementation date nationally of April 2021.

The review comprised a secondary and primary group focusing on each of the individual sectors. Each group was led by the Head of Education (Senior Phase) and included Head Teachers; Finance Manager; HR Adviser and Trade Union representatives.

Each group has specific Terms of Reference for review and the key aims and objectives of the groups were:

- To deliver a new, flexible and transparent DSM scheme for schools by August 2021 that empowers schools and Head Teachers to make decision that most affect their children and young peoples' outcomes while being part of a collaborative learning community and is fully inclusive of stakeholders. To advise of the necessary budgetary changes required to the pupil roll allocation (PRA) and staffing methodologies and budgets subject to the outcomes of the review.
- To deliver relevant training to all relevant stakeholders ensuring engagement on the new DSM scheme.
- To provide support to schools to manage change as a result of project outcomes.

Work of the groups was suspended in March 2020, following school closures and was re–established in April 2021. The implementation of the revised DSM for schools was rescheduled nationally to April 2022 given the pandemic as the staff resources and focus in schools was being directed primarily at online learning and learning recovery.
The outcomes and findings from the group have informed this new DSM scheme.

2.   Budget overview

The council's revenue budget for 2021/22 is £795.527m of which Education Resources net budget is £353.606m. In additional Education has specific grant funding for Early Learning and Childcare expansion of £32.227m and PEF and SAC funding of £12.235m including PEF premium.

For financial years 2021/22 the Education Resources budget is allocated as follows across schools and other service areas to deliver the Resource plan commitments:

Net Budget by Service	2021–22	
Detail	£m	%
Central admin	1.845	0.52%
CQIS	1.761	0.50%
Directorate	0.700	0.20%
Early Years	30.282	8.56%
Inclusion	1.008	0.29%
Learning Community	3.441	0.97%
Operations	0.165	0.05%
Primary Schools	124.670	35.26%
Psychological Services	2.254	0.64%
School Modernisation	36.518	10.33%
Secondary Schools	121.338	34.31%
Special Schools	18.213	5.15%
Support Services	4.040	1.14%
YFCL	6.089	1.72%
Youth Employability	1.282	0.36%
Total	353.606	100%

Additional funding has been allocated to Education this year and in future years for learning recovery and renewal. This is not included in the above budget however permanent funding will be allocated from April 2022 and will be allocated within the DSM scheme.

Budgets allocated under the DSM scheme to schools is £264.221m and this covers elements of both controllable and non–controllable budgets.

The DSM scheme will adapt to the inclusion of future funding streams that may be allocated to Education i.e. core curriculum charges funding, by including within the budget calculator for Pupil Roll Allocation (PRA) and likewise will incorporate any future budget adjustments as part of the council's efficiency exercise. The PRA is outlined in more detail in **Section 6.5.**

3. Areas of expenditure to be devolved
Whilst headteachers are given maximum flexibility over their budgets, there are areas of expenditure that are generally **not** considered suitable for devolution. The reasons for this may include but are not limited to areas outside the influence of a headteacher; areas that are too bureaucratic; have unacceptable levels of risk; benefit from economies of scale; require professional expertise; and complex by their nature.

These budgets are managed at a central Resource level and are **not** included in schools' carry forward figures and virements are not permitted.

Areas identified as not suitable for devolving and are deemed non–controllable by schools:
- Capital expenditure, including PPP/PFI costs
- Insurance
- Non–Domestic Rates
- Water Metered Charges
- Energy costs
- Waste collection
- Rent in relation to school premises
- School clothing grants
- Education Maintenance Allowances
- Home to school pupil transport
- Premature retirement costs
- Local Authority Information Management Systems (SEEMIS)
- Scottish Qualifications Authority Support Services cost, based within Schools.
- Other services supporting schools and young people, for example Psychological Services, Curriculum Quality Improvement Service (CQIS), Additional Support for Learning team, Learning Community teams and other centrally based support teams.
- Corporate support function costs for example Finance, HR, Procurement and Legal functions
- Carbon charges
- Long terms sickness absence
- Family leave costs
- Music Instructors
- Parent Council Expenditure

Budgets supporting facilities management costs including catering, cleaning and janitorial as well as ground maintenance of schools are managed and budgeted within Community and Enterprise Resources. Statutory Local Authority contracted work on managing the school estate including costs of planned maintenance and repairs of the Education estate are also managed and budgeted with Housing and Technical Resources on behalf of Education Resources. Income from the use of school premises is non devolved and managed by South Lanarkshire Leisure.

4.   General information on Devolved School Management
4.1.   Financial regulations
In order to conduct its business efficiently, the council must have sound financial management policies that are strictly adhered to. The requirement for sound financial management is further reinforced by the Local Government (Scotland) Act 1973 that stipulates that every local authority must make arrangements for the proper administration of its financial affairs.

The council's financial regulations provide the framework for managing the council's financial affairs. They apply to every member and officer of the council and everyone acting on its behalf. Additionally, all members and officers have a general responsibility for ensuring that the use of the council's resources is legal, properly authorised and provides value for money.

For these reasons the council has established financial regulations and supporting procedures such as this DSM Scheme of Delegation. The DSM Scheme of Delegation provides a transparent, fair and equitable distribution of resources to schools.

Further information can be found here: bit.ly/CMISPublicDocuments

4.2.   Best Value principles
The statutory duty of Best Value was introduced in the Local Government in Scotland Act 2003: www.legislation.gov.uk/asp/2003/1/contents

Headteachers should be aware of the council's Best Value principles. These principles apply to all council services and impose corporate responsibilities.

4.3.   Local Authority commitment to Devolved School Management
South Lanarkshire Council is committed to the principles of Devolved School Management, the Headteachers' Charter, and the aims of empowerment of funding.

In an empowered system, headteachers, schools and the Local Authority are partners, each contributing and supporting each other and respecting the different role each plays. The council recognises that value is added by enabling key decisions to be made by those who are closest to the educational experience of children and young people. Decision making about funding that affects the school should sit, therefore, at school level unless there is a compelling reason for this not to be the case **(see section 3) Areas Of Expenditure To Be Devolved**. The headteacher is accountable and responsible for decisions that should be made in consultation with pupils, parents, staff and the wider community.

The Headteachers' Charter advises that in an empowered system, headteachers should lead learning communities to determine the most appropriate approach in the areas of leading learning and teaching, empowering the learning community and making best use of the school's resources.

In relation to making best use of the school's resources, headteachers are required to:

- Manage a delegated budget in a fair, equitable and transparent way, supported by the Local Authority and a fair, transparent and equitable local Devolved School Management Scheme.

- Deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority.
- Play an active role in designing and reviewing recruitment and staffing approaches, both for their own school(s) and for the wider Authority.
- Be empowered to design a staffing structure which best supports the school's curriculum and leadership requirements, working within their delegated staffing budget and supported by their Local Authority and Scottish Negotiating Committee for Teachers (SNCT)/Local Negotiating Committee for Teachers (LNCT) agreements and guidance.
- Be integral to the appointment of staff in accordance with the best interests of children and young people, and work in partnership with the Local Authority to ensure good practice in recruitment and appointments, in line with SNCT/LNCT agreements and guidance.
- Work in partnership with the Local Authority, and within clearly defined roles, responsibilities and accountabilities, to ensure a highly professional school team is built and sustained to meet the needs of the learning community.

The council recognises that in relation to DSM the functions and roles undertaken within an empowered school system are not restricted to headteachers. Although the role of headteacher is identified throughout, shared and distributed leadership means that other staff members or groups may undertake an area or aspect of DSM. An empowered school system means that all teachers are empowered and have meaningful input to decisions about school funding. This manual supports distributed leadership, collaboration and consultation whilst recognising that ultimately the accountability and responsibility will reside with the headteacher as the leader of their school, supported by the Local Authority.

4.4. School expenditure within wider strategy planning (Resource Plan)

Decisions are made closest to the learner wherever possible and are delegated to Headteachers and schools. Headteachers are accountable and responsible for the use of financial resources within their school following consultation with pupils, parents, staff and the wider community, and in line with their School Improvement Plan.

School Expenditure is considered as part of the council's wider Financial Strategy. The council takes a strategic approach to financial and corporate planning which is consistent with the recommendations of the Accounts Commission, Audit Scotland and CIPFA who all emphasis the need for public bodies to focus on their medium to long term financial sustainability.

A 'golden thread' links school planning to the wider strategic planning of the council. School priorities are linked to the Education Resource Plan and the National Improvement Framework Plan, which, in turn, reflect the priorities of the council's Connect Plan and the Community Planning Partnership's Local Outcome Improvement Plan 2017 –2027.

Strong and distributive leadership is necessary to establish effective systems to support partnership working with pupils, parents, staff and the wider community to determine how best to utilise resource to deliver on local and school level plans.

Schools are empowered to make decisions that affect outcomes, while being part of a collaborative learning community and the Local Authority. Decisions about education spend are made in a collegiate and transparent way, paying due regard to wider responsibilities.

Headteachers are accountable to both the local authority and Education Resources for the leadership and management of resources within their settings and must comply with the financial and procurement regulations to ensure that the Local Authority is not compromised and that all legislation is adhered to.

Any issues regarding adherence to council Contract Standing Orders which reflect the financial and procurement regulations will be identified by Finance Service Unit or appropriate person and escalated to the Head of Education (Senior Phase).

4.5. Scottish Negotiating Committee for Teachers and Local Negotiating Committees for Teachers Agreements

Head Teachers are required to operate within the agreed SNCT terms and conditions for all staff who come under this scheme. The SNCT handbook is available:www.snct.org.uk

In addition, some terms and conditions are governed by LNCT (local) agreements and there is also a requirement to adhere to these. Details of local agreements can be found: www.snct.org.uk/lnctAgreements.php

South Lanarkshire Council local agreements can be found on the intranet https://intranet.southlanarkshire.gov.uk/TeachingLocalAgreements

These will be updated and reviewed in 2022. Local agreements are tabled at the JNCC and are then published on the intranet for reference.

5.   Staffing structures

5.1   Primary sector

5.1.1   Primary staffing teaching staff entitlement

Primary school staffing entitlement is based on the number of class groups which need to be formed, while still observing the statutory maximum limits of pupils in each class.

The legislative class sizes and SLC policy on application are detailed below:

Stage / Composition	Maximum class size
P1	25
P2 – P3	30
P4 – P7	33
Composite	25
Whole School Composite	19
Minimum in Stage Group	4

Timing
Head Teachers submit proposed class configurations following the P1 registration exercise in the January preceding the new school session in August.

Decisions on staffing are made during March to ensure compliance with the regulations in respect of placing requests. Head Teachers are notified of these decisions on completion of the exercise. Agreed staffing levels may be adjusted as a result of an increase or decrease in the pupil roll up until the start of the school session in August.

Separate communication will be issued of Head Teachers annually.
(Please refer to section 6.7, page 31 for key dates)

5.1.2. Primary schools – promoted teaching staff structure
In addition to the number of classroom teachers, the table below identifies the number of promoted posts that will be allocated to a primary school.

Number of pupils	Head Teacher	Depute Head Teacher	Other Teaching staff	Principal Teacher
0–100	1	–	–	–
101–250	1	–	0.4	1
251–350	1	1	–	1
351–429	1	2	–	1
Over 429	1	2	–	2

NB – Number of pupils is the sum of primary school pupils including ASN and Gaelic
(as recorded in the September Census) and Early Years pupils (as recorded in the January Census).

5.1.3 Budget allocation

Staffing budgets are allocated based on the approved salary as per average salary calculations for unpromoted posts and for management structure posts; the approved salaries and scale point are as per the SNCT Handbook of Conditions of Service.

Additional class teacher staffing budget is provided to schools to allow for Class Contact Cover. This is currently based on the current levels of class contact time of 22.5 hours per teacher. Allocation is 2.5 hours non–contact per class teacher for the total number of class teachers in the school, 0.1FTE per teacher, and this is reduced where a school has a Depute Head Teacher(s) at –0.2FTE per DHT or a Principal Teacher –0.1FTE.

e.g.   12 class teachers
CCC allocation 12 x 0.1FTE = 1.2FTE with 2 DHT 2 x 0.2 = –0.4FTE
Total allocation 0.8FTE class contact cover

This is applied for both mainstream and ASN teachers and management.

This allocation will be subject to any forthcoming national changes that will result in a reduction in class contact time. Any reallocation of staffing that is necessary to accommodate national policy changes on staffing will be updated and accommodated with the DSM staffing allocation and communicated to schools at the start of the new session in which it takes place.

Probationer teachers may also form part of school staffing and budgets are adjusted accordingly.

Maximum class contact time for Probationers is 18.5hrs – 0.82FTE. A full vacancy budget of 0.7FTE relates to a probationer being allocated to a vacant post. Such posts attract a 'funding level' of 0.30 which comprises 0.18 cover costs (reflecting probationer class contact time of 0.82FTE) plus 0.1 for mentoring and top up support of 0.02. Probationers may be appointed to lesser pointages as part of the overall probationer placement strategy and this is via discussion with CQIS and Finance Services Unit.

A separate provision will be made for the Gaelic Unit by the appropriate Head of Area in consultation with the Head Teacher.

5.1.4. Absence cover primary
The absence cover in primary schools comes from various support mechanisms available to schools. Initially schools will cover in the first instance on a short–term basis from within the school. This may take the form of any of the following targeted areas, including additionality that may exist within the school:

- Management time via promoted structures for short term and emergency situations
- Surplus staff in post
- Additionality in the school from NQT staffing
- Other funding sources and posts
- Learning Recovery
- Option of additional hours for part time staff

Also available to schools is the permanent area cover pool for primary and this can be accessed after 3 days. The permanent area cover pool scheme, covering primary and secondary, is outlined in **Appendix B**

Also accessible to schools is the Daily Paid Supply List. This can be access centrally on behalf of schools or directly by schools themselves. Funding for cover will be provided based on the nature of the absence. The reason codes to be used to ensure funding is allocated to schools and funded rates is outlined in **Appendix C**.

Schools can also access these cover options for Cover School funded requirements.

5.2. Secondary sector
5.2.1. Secondary staffing teaching staff entitlement
As part of the work of the review group, the model for secondary school staffing entitlement has been reviewed. The existing model was out of date due to a sequence of historic savings dating back to 2008/09 and the opportunity to revise in line with the DSM review was taken.

The revised model continues with a fixed and variable element bringing equity and a proportionate impact on all schools. The new allocations allow for adjustments to consider and remove historic decision from schools and reflects the most current data for all schools.

There has been minimum impact to schools as a result of the changes to the secondary staffing formula, with a minor change in two schools through the revision to the scheme, reflecting most up to date pupil numbers and this will be supported over 3 years for those schools with changing rolls.

Whole school roll	Staffing Allowance (FTE)
Agreed roll (including pupils enrolled in ASN bases)	Fixed element of 9.12 posts + (0.0576 x pupil roll)

All other processes for calculating staffing entitlement will remain the same and the changes reported via learning recovery later at section 5.8 Learning Recovery Permanent funding will be updated via the staffing formula in due course for additional permanent resources.

Timing
Provisional staffing entitlement will be identified in the January preceding the new school session in August with the agreed funding position established in March. This is necessary to allow option choice and curriculum planning in secondary schools to take place in advance of the new timetables starting in June.

Agreed rolls

In calculating the entitlement in March, an agreed estimate of future roll is used ("agreed roll"). This allows Head Teachers to plan for curriculum development and timetabling in advance of the new school session. This is based on the following methodology for each year group.

Year group	Methodology
S1	Current P7 rolls of catchment primary schools adjusted for the trend in previous year movements in ASN and placing requests
S2 – S4	Current S1–S3 roll as at September Census carried forward to the new session
S5 – S6	Applying the three–year average staying on rate to the current S4 and S5 roll

5.2.2. Secondary schools – promoted teaching staff structure
The table below identifies the various secondary school roll bandings where promoted teaching staff structures vary and shows the entitlement of promoted staff based on roll at Census.

Number of pupils	Head Teacher	Depute Head Teacher
501–850	1	3
851–1,200	1	4
1,201–1,500	1	5
+1,501	1	6

5.2.3 Promoted structure – learning and teaching

A promoted faculty structure exists in different formats across all schools to respond to local needs, demand for subjects within different schools, size of school and choice of Head Teachers.

The staffing of a faculty structure comprises Faculty Head at relevant scale point, equivalent post where faculty has not been agreed, or where the faculty does not exist, appropriate Principal Teacher posts.

Through the outcomes of the DSM review, it was agreed that the inconsistencies in the current arrangements be addressed through a revised structure broadly based on the *Curriculum for Excellence* curriculum areas, known as the '7+1' model.

Any posts that have been reconfigured will be subject to job–sizing and the proposals would be reviewed with the Head of Area and discussed for approval.

It was agreed that the allocation of management time would be aligned across all schools however the current arrangements will be maintained until the final methodology is agreed.

5.2.4. Promoted structure – pupil support

The allocation of staffing in relation to pupil support to secondary schools is as follows:

Number of pupils	Principal Teacher Pupil Support
421–630	3
631–840	4
841–1,050	5
1,051–1,260	6
1,261–1,470	7
1,471–1,680	8

NB – (This is based on a 210 pupil roll multiplier)

5.2.5. Budget allocation

Staffing budgets are allocated based on the approved salary as per average salary calculations for unpromoted posts and for management structure posts; the approved salaries and scale point are as the SNCT Handbook of Conditions of Service.

Probationers may also form part of staffing and budgets are adjusted accordingly.

Rolls will continue to be monitored up until Census in relation to the impact on staffing and management structures.

5.2.6. Absence cover secondary
The Absence cover in secondary schools comes from:

- Provision within the normal staffing complement of the school. This includes the core staffing allocation and might include additionality agreed through individual arrangements or through maintaining surplus staff in the school;
- Additionality provided through the *Secondary School Absence Cover Scheme*; and
- Central cover for absences extending beyond 15 days.

Cover from the staffing complement
The extent of cover available in a secondary school is dependent on the allocation of staff to the timetable. The amount of cover available in each school is the residual balance of staff availability vs class commitment. (Staff availability is defined as maximum class contact time less agreed management time calculated in periods for all staff in the school on an individual–by–individual basis).

Cover from the staffing complement, excluding additionality, should normally be sufficient to cover all absences of 3 days or fewer.

School arrangements for the provision of cover should be determined by the head teacher following consultation with all staff, including trade union representatives.

Internal cover duties should be distributed on an equitable basis, having regard to the respective workloads of all staff.

It is recommended that schools retain at least 5% of the total staff availability to provide short term cover. Schools should not timetable any less than 4.5% of the staff availability for cover. Staff who are funded centrally, including surplus staff retained in the school, should be included as additionality and their time be available as additional cover.

Secondary school absence cover scheme
An additional allocation to the normal staffing complement will be provided in order to support cover required for absences of 15 days or fewer, as outlined below.

The *Secondary School Absence Cover Scheme* will be delivered by the provision of a further staffing allocation based on the following roll bands:

Roll	FTE (periods for cover)
501–850	2.5 (67 periods)
851–1200	3.0 (81 periods)
1201–1500	3.5 (94 periods)
1500+	4.0 (108 periods)

Deployment of the additional allocation is at the head teacher's discretion and should be considered within the normal timetabling exercise undertaken each session and, where required, throughout the year.

No other cover will normally be made available to the school for the first 15 days of absence. A situation will be deemed abnormal when the sickness rate in the school is in excess of 10% of the teaching complement or where the level of absence cover required would result in a breach of the agreement for school cover up to 15 days.

This new cover scheme has been operational since August 2020. Schools are required to record absence to ensure the appropriate application of the agreed rules. The existing form will allow this.

The agreement will last until further notice but will be subject to continuous review.

Centrally provided cover
Provision is retained centrally for cover for absences extending beyond 15 days, including maternity cover, through the permanent cover pool. The permanent area cover pool scheme, covering primary and secondary, is outlined in Appendix B.

5.3. ASN sector
5.3.1. ASN staffing teaching staff entitlement allocation
Primary ASN teacher allocation is predicated on 1 teacher per class within the base or school. This is the core staffing and that is then augmented by agreed additionality depending on the needs arising within a base or school. An example of this is the additionality of 1 teacher per primary base to assist with inclusion activities. This was allocated a number of years ago as approved within the council's financial strategy.

Secondary ASN staffing is more complicated because of the need to provide a spread of subject specialism within the bases and schools. When the bases were developed initially the level of staffing was agreed and since that time this has been the baseline for ASN staffing in each school. As pupil rolls across schools have either diminished or grown, there has been some additionality provided for specific schools, depending on the circumstances, and some schools have had staffing budget removed to be placed elsewhere.

When staffing levels have been compared to pupil roll for bases and schools, it is clear that the average staff to pupil ratio is 1 to 6, with variations in each school.

5.3.2. Pupil numbers and classes for pupils
As outlined in the previous section the average staff to pupil ratio in our schools and bases is 1 : 6. The table below sets out the national agreement contained within SNCT terms and conditions for staff to pupil ratios for additional support needs.

Class sizes for Special School and Units	Maximum class size
Additional Support Needs arising from:	Number of pupils
Moderate learning difficulties	10
Profound learning difficulties	10
Severe physical impairment	8
Severe learning difficulties	8
Significant hearing impairment	6
Significant visual impairment	6
Language and communication difficulties	6
Social, emotional and behavioural difficulties	6

5.4.   School support allocation
5.4.1. ASN
The ASNRT process is conducted annually in May each year with the objective to set the allocation of School Support Assistant (SSA) in ASN provisions for the following school year. A forum is established, led by a Quality Improvement Officer – Inclusion, supported by two Support Services Coordinators and with representation from a senior officer (usually DHT) from an ASN provision.

Establishments submit returns each year as part of this process normally at the end of April/beginning of May to the education.inclusion@southlanarkshire.gov.uk mailbox; indicating the level of support required (usually the additionality each year) they are seeking and the rationale for their request. This is normally based on either an increased roll, level of need or a combination of both

Decisions are based on these returns provided by schools and this is considered by the forum and allocations are made based on prioritisation of need within available resources. If required, the forum will contact an establishment directly if they require a further point of clarification to support the decision making.

Establishments are notified of decisions and allocation normally by the end of May at the latest. Decisions are communicated by email from the Inclusion admin team on behalf of the Quality Improvement Officer – Inclusion. There is no formal right of appeal, however, establishments are able to further discuss their allocation with their respective Inclusion Officer or raise with the Inclusive Education Manager.

Allocations may (on occasion) vary throughout the course of the year. Most notably this would occur if an emergency placement or new to authority pupil has been offered a place and it is deemed, after discussion, that the current allocation requires a variance to support the increased level of need.

There is no indicative allocation on a formula basis to schools; however over time the approach will be to have SSA allocations that are consistent across ASN provisions with similar rolls and similar level of need. This will be incorporated into future DSM updates at the appropriate time.

A review of the allocation is scheduled to take place in October of each year once the new P1 and S1 intake have settled into schools and the receiving school has concluded their own assessment of need.

Specific support on this process is via the Inclusion Education team.

5.4.2. SSA mainstream
The LCRT process is conducted annually in May each year with the objective to set the allocation of School Support Assistant (SSA) in mainstream establishments for the following school year.

A forum is established, led by the Senior Manager Pupil Support along with the local Support Services Coordinators and with representation from all establishments in the learning community.

Establishments submit returns each year as part of this process normally at the end of April/beginning of May to the Support Services Coordinator; indicating the level of support required (usually the additionality each year) they are seeking and the rationale for their request. This is normally based on either an increased roll, level of need or a combination of both.

Decisions are based on these returns provided by schools and this is considered by the forum and allocations are made based on prioritisation of need within available resources. If required, the forum will contact an establishment directly if they require a further point of clarification to support the decision making.

If required, the forum will contact an establishment directly if they require a further point of clarification to support the decision making.

Establishments are notified of decisions and allocation normally by the end of May at the latest. Decisions are communicated by the Support Services Coordinator.

Allocations may (on occasion) vary throughout the course of the year. Most notably this would occur if an emergency placement or new to authority pupil has been offered a place and it is deemed, after discussion, that the current allocation requires a variance to support the increased level of need.

5.4.3. SSA office support
The allocation of office staff differs across all schools depending on the needs of the school. There is no fixed allocation or formula applied as resources are allocated based on young people's needs.

Some schools timetable staff in, some have full time staff and some have a mixture of both. The allocation of hours is agreed with the Head of Establishment and the Support Services Coordinator each year however these hours can be utilised in the class when priorities change.

The allocation can vary from large primaries having up to 3 and secondaries generally between 4 and 6. Allocation in this case are not necessarily school roll based.

The LCRT and the ASNRT processes are both under review and any changes following the review to the allocation models will be updated within the DSM in due course.

5.5.   Learning Community staffing

Schools can access wider supports offered by the Extended Community Team. This team, based in each area, has Early Years Specialist Support Teachers, Primary and Secondary Specialist Support Teachers, EAL teachers and a Care Experienced Teacher. Within Early Years, Nurseries submit a Request for Assistance, (RFA) alongside staged intervention paperwork to access this support.

Primary schools have an allocation of a minimum of 1 day every two weeks where Specialist Support Teachers focus on literacy and numeracy. There are area variances with this. Support is allocated to pupils following discussions with the ASN coordinator in each school. Data is used to ensure support is directed where it is required most. Input can include direct support to pupils, staff training, resource identification, literacy pathway consultation, attendance at review meeting. In addition to this Primary schools can submit a RFA to their link Senior Manager Pupil Support (SMPS) for targeted interventions linked to pupil Health and Wellbeing. This can include Emotion Works, Nurturing Talk, Talking Partners, Give us a Break.

As a minimum, Secondary schools can submit RFA's for health and wellbeing support. In some localities, a link SST has been allocated to each Secondary for advice and consultation. In line with Staged Intervention, this may still include some short term, direct working where appropriate. In addition, they can access the support of the Care Experienced teacher for those pupils in S1–S3 who are or have been Care Experienced.

This support is designed to enhance and support engagement in education and to improve attainment. This is allocated following discussion with the Designated Senior Manager to ensure support is targeted at those who need it most.

5.6.   Legislative and contractual requirement

SNCT code of Practice on Headteacher outlines the responsibility in Recruitment and Selection of staff.

The Joint Empowering Schools Agreement published in June 2018, outlines the shared commitment to a number of principles including:

- headteachers are involved in the design of recruitment and appointment processes.
- headteachers design the staffing structure that best supports learning and teaching in the school, within the staffing budget delegated to the school by the Local Authority.

- headteachers choose the staff who work in their school, with due regard to employment law and the contractual obligations of their Local Authority, and.
- the Local Authority must be able to intervene should any statutory duty, or contractual obligation be in breach.

5.7. Staff resource

It is expected that Head Teachers should play an active role in designing and reviewing recruitment and staffing approaches, both in their own school/s and for the local authority.

In this authority, each year a teacher recruitment campaign begins in February and Head Teachers are involved throughout the process in terms of identification of recruitment needs, planning for recruitment and actively taking part in the process. This includes involvement in short listing, interviews and the selection process.

Recruitment across the Resource is monitored by the Education Staffing group, chaired by the Head of Service, Personnel and Finance representatives are involved in these meetings where the strategic overview of Education's staffing needs is identified and managed for all staffing groups.

Head Teachers are also consulted on the allocation of support staff to schools as outlined in section 5.4 above.

5.8. Learning recovery

Additional funding has been allocated through 2020/21 and 2021/22 to support schools in learning recovery following the pandemic. This has been provided given additional funding received to support our schools and young people with additional support for learning through additional teaching staff, school support assistants and dedicated study support and tutoring programme. Funding has been allocated on a temporary basis to schools and permanent funding has now been allocated.

Funding has been provided to schools in various ways and permanent funding will continue to be allocated via the DSM model.

Area cover

As a result of the recruitment campaign in 2021/22; a number of candidates were offered a 1– year fixed term contract and these were allocated to base schools across schools.

Primary schools

Funding allocated to Primary schools in 2021/22 is allocated on a pointage basis based on school roll.

This can be utilised by booking a teacher from the area cover pool using an app1 and using the Code 92 (COVID Additionality), in the Clydesdale area, if no one is available this can be utilised on school's own teaching staff doing extra days or through supply teachers.

6.   Accounting
6.1.   Financial year and issue of budget statements
The financial year runs from 1 April to 31 March and spans two academic years. Budget statements are issued to schools at the commencement of the financial year, Entitlement Budget, and updated during the year to take account of changes within the academic year.

Monthly budget statements are issued each period by the CTO as part of revenue monitoring processes as well as information in relation to additional funding or budget movements within the period.

Staffing entitlement reports are issued each year and staff reconciliations are conducted three times per year to consider 'in post' staffing to entitlement. This also links to work involved in the Scottish Government Pupil and Teachers annual census.

Head Teachers are expected to work with the FSU and CTOs to consider financial forecasts in relation to the council's probable outturn exercise each year including projected carry forward balances and REF contributions; giving due consideration to external funding including Scottish Attainment Challenge funding; PEF and SAC.

Funding allocated for Scottish Attainment Challenge supporting activities and staffing related to closing the poverty related attainment gap, will be allocated to schools as part of the budget setting exercise for the 1 April each year. This may be updated during the year for any changes to the allocations.

A further forecast is required early March from schools in relation to projected carry forward balances. Following completion of the council's final accounts, carry forward figures are confirmed with schools prior to the start of the new session.

6.2.   Budget underspend / overspend and carry forwards
Carry forwards
Under the DSM scheme, schools may carry forward a proportion of unspent budget at the end of the financial year. The carry forward is calculated by determining the net expenditure position on all fully devolved budget headings as at 31 March.

The specific rules for controllable and non–controllable budgets are detailed in section 3 of the policy and detailed in Appendix D and E.

The maximum underspend balance that can be carried forward on controllable budget lines is set at 30% of the base budget. Plans should be prepared for determining how any underspend is to be utilised.

Year–end carry forwards will be subject to scrutiny from Finance Service Unit (FSU) to ensure that appropriate financial management arrangements are in place.

All overspends/deficits will be carried forward to the next financial year in full and Head Teachers will be expected to report on the reasons to their Head of Area and will also be required to provide a detailed plan to address any overspend. Head Teachers are advised to avoid material overspends and to ensure that resources are managed effectively. Any budget overspend will incurred by the Head Teacher will be carried forward in full to the next financial year and will have the effect of reducing total funds available for expenditure that year. It is expected that any overspend will be repaid in full the following financial year; however, in some exceptional circumstances a three–year repayment may be agreed.

In addition, where schools incur an overspend at the end of the financial year it is the responsibility of the Head Teacher to ensure that an action plan is developed to redress the position. This action plan should be shared with Education Finance Services Unit and their Head of Area who will take an active part in monitoring progress in delivery.

If a school's year–end position is, despite support and without prior negotiation with the Education Finance Services Unit or Education Management Team, persistently or unreasonably in excess of the devolved budget, then such action may be considered by the service as grounds for disciplinary action.

FSU, as part of year end processes, will provided for the school carry forward balance within accounting as a contribution to reserves and this balance will be made available to schools in the new financial year.

6.3.   Virement

Head Teachers are permitted to transfer budget between one spend area and another. Such budget transfers are known as virements.

It is recommended no budget should be transferred out to an area where there is an ongoing commitment into future years, e.g. diverted funds cannot be used to permanently increase staffing levels as the source of funding cannot be guaranteed in future years. This principle also applies to temporary grant funding. If schools do this, they accept the full financial risk.
The new scheme allows for unlimited virement across controllable budget lines to i.e. budget that is the responsibility of Head Teachers. However this does not apply to Teacher Salaries and Cover School Funded. Virement is not allowed from areas where the budget is managed centrally or not devolved to school level i.e. is not controlled by the Head Teacher.

The specific rules for controllable and non–controllable budgets are detailed in section 3 of the scheme and in Appendix D and E.

6.4. Replacement Equipment Fund

The replacement equipment fund is a tool available to schools that provides Head Teachers with the opportunity to place annual revenue funding into council reserves in order to allow planning for larger areas of investment in the future to meet the needs of the school.

Previously this has been restricted to large capital items and Head Teachers are required to hold relevant spending plans to enable the contribution to reserves to be made.

Under the new scheme the REF is extended to allow Head Teachers to improve the financial management arrangements of the school in line with the school three–year improvement plan and allow for proactive allocation of investment to the appropriate financial year in line with the school plan. There is a continued requirement for Head Teachers to hold investment plans to support and justify the contributions made.

The REF enables Head Teachers to 'save up' for larger areas of spend, including but not exclusively capital items i.e. reading schemes etc to allow resources to be more efficiently managed and offer greater flexibility and control of their budget at a local level within the principles of the scheme. The changes to the scheme offer wider level of investment for non–capital related purchases.

- The minimum contribution level has been set at £250 with no upper limit to annual contributions.
- The minimum withdrawal from the fund is £150.

Through consultation it has been determined that these limits offer flexibility to Head Teachers whilst continuing to ensure efficiency within administration arrangements at the same time.

The accounting arrangements for REF continue in the same way via Cluster Team Officers and the Education Finance Services Unit.

6.5. Pupil Roll Allocation (PRA)

A significant number of budgets are allocated based on agreed and prescribed budget rules. For all budgets allocated under the PRA the rules and allocation methodology are outlined in Appendix D for primary, secondary and ASN.

PRA is allocated for 'Entitlement' budgets at the 1 April each year and any additional allocations to budget or savings impacting of these budgets are managed on a transitional basis and incorporated into the next financial year budget.

Budgets not allocated via the PRA for which schools are responsible; tend to be from fixed allocations as a result of historic budget realignments, new funding streams or approved management savings. These form part of schools' total budgets and are within the controllable elements of the DSM. Appendix E provides details of the budgets allocated to schools that are set or fixed allocations.

As part of the work of the DSM review group, various budgets allocated to schools were rationalised and consolidated to make allocations easier to understand and more relevant for schools. This included the removal of historic management savings as part of the per capita allocation and reflecting the actual per capita rate for each pupil in the budget allocation for the year.

The information contained with Appendix D reflects the realignment and streamlining work of the group and the new rationalised budget allocations. These are now more accessible and presented in a useful and easy to follow format.

Moving forward, any changes to the per capita rate in schools, either through future savings or funding for growth, will be reflected within the PRA rates. This exercise had no financial implications and schools were not disadvantaged in anyway as a result of the process change.

Similarly, changes impacting on other budgets as outlined **in Appendix D** will be managed in the same way

6.6. School Fund
The new Devolved Management Scheme does not cover the management of school funds in schools. Arrangements surrounding the management and use of the school fund is contained within the operating procedure and guidance note on school funds – SSUPN 2020–01.

The procedure notes and guidance are maintained by Support Services and the link to the procedure note, guidance, proforma and spreadsheet can be found on the intranet via the following links:

https://intranet.southlanarkshire.gov.uk/SchoolFundProcedureNote
https://intranet.southlanarkshire.gov.uk/SchoolFundProcedures
https://intranet.southlanarkshire.gov.uk/SchoolFundProforma
https://intranet.southlanarkshire.gov.uk/SchoolFundSpreadsheet

6.7. Key dates
The following table illustrates key dates and relevant personnel for annual activities that affect the monitoring and allocation of devolved budgets.

Date	Action	Responsibility
April	Financial management system updated for new year budgets Budget statement issued to schools	FSU
April	Yearend activities and processes	CTOs/FSU
June	Budget sheets issued to confirm primary teaching entitlement for next session	FSU
August	Yearend outturn statement issued to schools	FSU
August	Budgets updated for Carry Forward adjustments Carry Forward statement issued to schools	FSU
August	Budgets updated for new session teaching entitlement including CCC allocations	FSU
August	Budgets updated for probationers	FSU
September	Census date	HTs
January	Provisional calculation of secondary staffing entitlement for new session	FSU
January – March	Calculation of budgets for new financial year	FSU
January – June	Primary class configurations for new session	HTs/FSU
February/March	Identification of surplus teachers	FSU/PSU
March	Confirmation of secondary staffing entitlement for new session	FSU
March	Financial year end	

6.8. Roles and responsibilities

In order for Devolved Management to operate effectively it is necessary to ensure that there is appropriate support and challenge mechanisms in place. The following table illustrates some of the key areas and principles required to effectively deliver DSM.

Key area	Education Management Team	Head Teachers	School Administration and Cluster Team Officers	Education Finance Services Unit
Operate within the council's Financial Regulations	√	√	√	√
Provide clear leadership and strategic management	√	√		√
Monitor budget performance at regular intervals	√	√	√	√
Set the levels and approaches to resource allocation	√	√		√
Ensure the quality of service and seek improvement where necessary against school, local authority and national targets and outcomes	√	√		√
Develop strategic partnerships with community planning partners and other	√	√		
Ensure the provision of a range of high–quality Central Support	√			√
Set policy framework in which schools and other educational establishments	√			
Where required provide action plans detailing corrective action on areas of		√	√	√
Formally record budget discussions		√	√	√
Manage establishment in line with DSM guidelines		√	√	
Use devolved resources to effectively deliver the curriculum		√		
Consult with staff, pupils and parent council on the spending profile for the		√		
Provide relevant financial statements by agreed timescales		√	√	√

6.9. Participatory Budgeting (PB)

Participatory budgeting is a way for people to have a direct say in how local money is spent and it gives a voice to all stakeholders. It helps more people to get involved and have a say. Participatory budgeting is more than just getting pupils and parents to vote on options, they need to explore the issue and be involved in recommendation for the priorities of the school and young people.

Participatory budgeting complements aspirations in the Community Empowerment (Scotland) Act 2015 www.legislation.gov.uk/asp/2015/6/contents/enacted to give communities more powers to achieve their own ambitions.

Since then, the Scottish Government and COSLA made a commitment that at least 1% of local government budgets in Scotland will be subject to participatory budgeting by the end of 2021.

As outlined in an SLC Executive Committee Paper in March 2020, each Resource must participate to fulfil SLC's part in the 1% agreement.

For SLC Education Resources it was agreed that 5% of PEF funding would be subject to participatory budgeting.

Through this process schools should:

1. Identify a minimum of 5% of 21–22 PEF Allocation for PB
2. Identify PB Lead and Lead to familiarise themselves with PB process
3. Establish PB Stakeholder Group
4. PB group to meet and be shown introductory PP
5. Generate Ideas
6. Communicate PB suggestions
7. Count the votes and communicate options
8. Spend the money within the constraints of the Pupil Equity Funding National Operational Guidance

Outcomes of PB decisions must satisfy Pupil Equity Funding key principles and must enable schools to deliver activities, interventions or resources which are clearly additional to those which were already planned. The funding must provide targeted support for children and young people (and their families if appropriate) affected by poverty to achieve their full potential.

PB resources can be fund via the useful links below:

https://pbscotland.scot/pb-in-schools
www.education.gov.scot/improvement/learning-resources/participatory-budgeting-in-educational-establishments/
www.cpag.org.uk/scotland
https://bit.ly/EISPactReport

Future areas of PB will continue to be explored and with greater elements of school budgets possibly including core budgets may be subject to PB in the future. Communication and updates will be provided to schools as council policy is agreed.

6.10. Online payments

Parents/carers are now able to pay for school meals, trip and other school activities through the ParentPay system and they should be encouraged to do so by schools in order to reduce the risks for pupils and staff in relation to cash handling.

6.11. Purchase cards

Purchase cards are available to secondary schools for Home Economics food purchases. Purchase cards are also being rolled out to schools, on a learning community basis, to support spend on low value items including, online training course and non–contractual school specific items e.g. Winter clothing allocation.

Separate procedures for the use and control of purchase cards are provided when cards are set up including the cardholder agreements and audit controls.

6.12. Text Alert System

The annual cost of text alerts is financed by schools from their devolved budget based on usage. Schools will be recharged separately for the charges quarterly.

7. Professional support
7.1. Professional Support teams, functions and transparency

Activity	Education Resources	Function
Management Support	Education Management Team	Support to schools and establishment via the Heads of Area/Service re strategic direction and guidance
Admin and Operational Support	Support Services	School capacities, catchment review, home to school transport, EMA, placing requests, school admission and enrolments, SEEMIS, census, Supply teacher payments, communications, pupil and parent support, parental engagement.
School Estate	School Modernisation	Support with school buildings, school capacities and links to catchment review and property related matters. Link to Housing and Technical Resources re repairs and planned maintenance and PPP for secondary schools.
Inclusion	Inclusion Services	Support with special schools and ASN, LCRT, LAACC, counselling in schools, ASN transport, special support teaching, occupational therapy, YFCL services. Psychological Services.
Equality and Equity	Curriculum and Quality Improvement Service	Scottish Attainment Challenge – PEF and SAC, cost of a school day, closing the poverty related attainment gap.
Employability	Youth Employability	ASPIRE, Gradu8, Foundation Apprenticeships, senior phase.
Curriculum Support	Curriculum and Quality Improvement Service	Quality improvement and curriculum, attainment, advice and complaints, home schooling, student teacher placements, teacher induction scheme, CPD and training

Activity	Other Resources	Function
Finance and Corporate Resources		
Financial Services	Finance Service Unit Cluster Team Officer (CTO)	Budget management, budget statements, monitoring and carry forwards, buyer role, class configuration and staffing allocation, census
Human Resources	Personnel Services	Dedicated support aligned to Education supporting all aspects of HR including recruitment, cover and supply staff, employee relations, contracts, job sizing, health and safety
Legal and Risk	Legal Services and Risk Management	Support for legal issues and risk management.
Procurement and AP services	Finance Services Transactions	Support with all aspects of procurement including contracts, iProcurement and invoice payment.
Community and Enterprise Resources		
Facilities Management	Facilities CER Facilities Officer	Support with catering, cleaning and janitorial

Detailed contact information for specific teams is outlined in **Appendix F.**

8.   Consultation, engagement and transparency

8.1.   Consultation and engagement

South Lanarkshire Council adopts a collegiate approach to setting policy and procedures, including the Devolved School Management Scheme. The Devolved School Management Scheme, and the principles which underpin it, have been informed by discussion with Headteachers and the Local Negotiating Committee for Teachers.

Headteachers will consult with staff, parent councils, pupils and the wider community, including the application of the Devolved School Management Scheme where appropriate, through the established mechanisms for consultation and engagement.

Any support for learners should be well–considered and involve meaningful discussion and engagement with our schools and establishments, children and young people as well as the wider community. However, it is important to move promptly to address areas of obvious need.

South Lanarkshire Council has an established Parental Involvement Strategy which will be used in the consultation and engagement process for the Devolved Scheme of Management by schools.

Link to Parental Involvement Strategy
www.southlanarkshire.gov.uk/ParentsAsPartnersStrategy

8.2. Transparency

Local Authority budgets and Education budgets are reported and approved annually at the Executive Committee and are available on the council's website.

Delegated school budgets are provided to Head Teachers, by the Finance Service Unit, annually who in turn will discuss with their Parent council and provide copies. These budgets support the School Improvement Plan and Head Teachers will outline local priorities through their application of the Devolved School Management Scheme.

The Devolved School Management Scheme, and the principles which underpin it, have been subject to a process of consultation and engagement. The Scheme has been reviewed and considered by the Education Management Team and agreed by Education Committee.

The operation of the Devolved School Management Scheme is subject to regular review, informed by the ongoing dialogue between schools, central education services and the Finance Service Unit on the operation of the Scheme.

In addition, a short life DSM Review working group lead by Education Resources publishes the DSM scheme every 3 years. This review sets out any amendments to the DSM scheme, specifically where council budget setting priorities have impacted on DSM arrangements.

The operation of the Scheme is scrutinised by the Local Negotiating Committee for Teachers. The Devolved School Management Scheme is published electronically along with information on individual schools and the policies and procedures they follow.

9. Collaboration
9.1. Local priorities
The Local priorities to be supported and addressed by schools through their application of the Devolved School Management Scheme are set out in:

- School Improvement Plans
- The National Improvement Framework Plan
- Education Resource Plan
- South Lanarkshire Council Plan
- South Lanarkshire Community Planning Partnership Local Outcome Improvement Plan
- Local Authority decisions about education spending are expected to be made in a collegiate and transparent way, paying due regard to their wider responsibilities, including Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.

10. Training
10.1. Training support
As part of the budgetary control process, an ongoing programme of training is provided by the Finance Service Unit (FSU) for budget holders via CTOs.

Specific procedural changes and communication updating on budgets is provided from the FSU via Finance Service Unit Procedure Notes FSUPN. These are issued periodically across the year on finance and budget matters.

Financial training is provided to Head Teachers through Induction training and is provided for all new budget holders and Head Teachers via the CQIS training for Head Teachers.
The DSM short–term working groups for both primary and secondary have identified additional training needs for key staff in schools and establishments and FSU staff will provide other training and additional support based on an assessment of training requirements.

Budget holders identifying training requirements should contact the FSU to discuss requirements.
education.finance@southlanarkshire.gov.uk

11. Scheme administration
11.1. Publication availability
The DSM scheme and summary document will be published on the South Lanarkshire Council website with a link provided on all school websites.

11.2. Scheme review and stakeholders
The outcomes of the council's budget setting and annual funding strategy and any impact of funding decisions taken by council will be communicated annually in February each year.
The DSM scheme will be subject to 3–yearly review involving stakeholders and a peer Local Authority if appropriate, or via the Regional Improvement Collaborative, and will be published following Committee approval of the scheme.

This will be carried out through a short life DSM Review working group lead by Education Resources with representation from relevant stakeholders (including, Head Teachers, Finance officers, HR officers and the relevant professional associations).

Local representation on the ADES Resources Network will enable access to formal/informal inter–authority benchmarking exercises.

Appendix A – Expected and recommended summary

Reference: Devolved School Management Guidelines (Scottish Government Document)

The DSM guidelines recognise that in relation to DSM the functions and roles undertaken within an empowered school system are not restricted to headteachers. Although the role of headteacher is identified throughout, shared and distributed leadership means that other staff members or groups may undertake an area or aspect of DSM. The guidelines support distributed leadership, collaboration and consultation whilst recognising that the accountability and responsibility will reside with the headteacher as the leader of their school, supported by the Local Authority.

In some cases the guidelines note statutory requirements on Local Authorities. For the avoidance of doubt, nothing in these guidelines detracts from those statutory requirements, which all Local Authorities must comply with.

General	
Expected	ecommended
Local Authorities schemes adhere to financial regulations, deliver best value and ensure the efficient, fair and equitable distribution of resources.	
Headteachers deploy the school's budget in accordance with best value principles and Local Authority procurement arrangements, with appropriate support and guidance from their Local Authority.	
Local Authorities should ensure that devolution is meaningful and empowers school leaders to make appropriate, and informed decisions to best meet their local need in line with legislation and Local Authority policies, guidance and frameworks.	Local Authorities scheme clearly define areas of resources that are not devolved to schools.
Headteachers are expected to ensure school expenditure is in line with the School Improvement Plan supporting the relevant Local Authority strategic plans, priorities and the National Improvement Framework.	

General	
Expected	**Recommended**
Local Authorities and headteachers must adhere to legislative requirements, SNCT and LNCT agreements and guidance.	

Format and publication	
Expected	**Recommended**
	Local Authorities are strongly encouraged to utilise the format of the DSM Framework for their scheme. This is available from www.gov.scot/policies/schools/devolved–school–management/
Local Authorities are expected to publish the DSM scheme on the external facing website	Where a school has a website, it is recommended that it should include a web link to the Local Authority published scheme.
Published schemes should include the criteria and methodology used to create formulae–based allocations, staffing models and other resource allocations as appropriate. If formulae have been applied, the formulae should be included within the scheme.	Local Authorities should consider publishing a summary of the authority's scheme, providing stakeholders summary information in an accessible way, using plain language.

Training	
Expected	**Recommended**
Local Authorities should provide specific DSM training to key staff groups including headteachers and Business Managers or associated posts.	It is recommended that training opportunities are made available to depute headteachers, aspiring leaders, elected members, and any other appropriate staff who utilise or influence DSM decisions.
Where school or establishment staff have a delegated budget responsibility, they should be aware of the aims and principles associated with DSM, best value and adhere to financial regulations and Local Authority policies for the funds they are responsible for.	Training should be available for new and experienced staff members.

Training	
Expected	**Recommended**
Training should be available on a frequent and recurring basis.	School leaders have access to local and/or national leadership programmes and training which ensures an approach to DSM that encourages confident decision–making to promote better outcomes for learners.
Consultation, engagement and transparency	
Expected	**Recommended**
Consultation and engagement at all levels between Local Authorities, headteachers and stakeholders should take place to inform appropriate resource decisions, including: budget, staffing models and savings. This includes consultation on criteria used when determining how a formula is devised or applied and other methodology of distributing resources.	
Local Authorities should form appropriate mechanisms or forums for regular engagement and consultation with headteachers and wider stakeholders as appropriate.	
Consultation and engagement between headteachers and staff groups should take place to inform appropriate resource decisions, including: budget, staffing models, department budget allocations and savings.	Headteachers should form appropriate mechanisms or forums for regular engagement and consultation with staff, parents and wider stakeholders as appropriate.
Headteachers should consult with staff, parent councils, pupils and the wider community on appropriate matters, these may include school staffing models, DSM decisions, allocation of departmental or class resources and include formulae or criteria used within the school.	

Training	
Expected	**Recommended**
Headteachers share and discuss local school decisions, budget and resource allocations with staff groups and wider stakeholders as appropriate.	It is recommended that at school level this includes methodology and distribution of budgets and resources.
Local Authorities make information available to all stakeholders in relation to the Local Authority budget, education budget and delegated budgets to schools, including identifying areas of expenditure that are not devolved to headteachers.	
It is expected that DSM schemes, and information published for stakeholders is accessible and is in plain language.	
Headteachers are to ensure that any costs related to the curriculum are minimised to ensure equality of access.	Where charges exist for pupils, including both curriculum or extra–curricular activities (class materials, school trips, school uniform, etc.) they should be clearly detailed in school information published at the start of the academic session. In light of the recent funding and policy change to Core Curriculum charges in August 2021, schools no longer charge for core curriculum activities.
	Any potential financial assistance, discounts or exemptions available, for example in relation to pupils in receipt of free school meals, should be included within this information.
Consultation, engagement and transparency	
Expected	**Recommended**
DSM schemes should be informed by local priorities to enable it to contribute towards shared agendas and improved outcomes, it should enable stronger partnership working between schools and other agencies and stakeholders.	

Consultation, engagement and transparency	
Expected	**Recommended**
Local Authority decisions about education spending are made in a collegiate and transparent way paying due regard to Getting it Right for Every Child (GIRFEC) and the role of Local Authorities as Corporate Parents.	It is recommended that Local Authorities consider empowerment on an area or school cluster basis, enabling headteachers to influence decisions across geographical areas or school clusters.
Headteacher are expected to be collaborative and collegiate in their approach, challenging themselves and stakeholders to be solution focused embracing joint working with the learning community, parents, children and young people, teachers and support staff, partners, other schools and the Local Authority.	It is recommended that headteachers work together to share and maximise resources to influence outcomes across geographical areas or school clusters.
Staffing	
Expected	**Recommended**
Local Authorities should empower headteachers to design a staffing structure to suit the school's context within their delegated budget and in accordance with SNCT and LNCT agreements and guidelines.	Local Authorities consider their approach when devolving staffing, this includes discussing with Headteachers the complexities and risks associated with staffing allocations.
Schemes should seek to devolve the appropriate resources to schools, whilst ensuring that legislative and contractual requirements are met and local circumstances and need taken into account.	
The Local Authority, with headteachers will seek to deliver the most appropriate and efficient use of staff resource ensuring equity, transparency and clarity whilst promoting and supporting collaboration and collegiate working.	

Staffing	
Expected	Recommended
Headteachers should play an active role in designing and reviewing recruitment and staffing approaches, both for their own school/s and for the Local Authority.	
For all staffing matters, headteachers must adhere to the appropriate legislation and Local Authority, NCT and LNCT agreements and guidelines.	
Headteachers should be consulted on the allocation of support staff to schools.	
Professional support	
Expected	**Recommended**
Headteachers in all schools should have access to professional support teams and functions.	
There should be transparency in the formulae or methodology in allocating professional support to schools.	
Accounting	
Expected	**Recommended**
Headteachers should have the provision to carry forward budget underspend or overspend in line with agreed and published Local Authority policy and criteria.	Intended use of carry forward of budget underspends are identified in School Improvement Plans or school budget spending plans.
	Procedures for managing carry forward of overspends are included within the scheme.

Accounting	
Expected	**Recommended**
	Consideration is given towards enabling schools to deposit funds to save budget for planned and agreed future spend.
Headteachers should have the provision to vire budget between budget headings in line with agreed and published Local Authority policy and criteria.	
Scheme review	
Expected	**Recommended**
Local Authorities undertake a three–year review with stakeholders and a peer Local Authority as they determine appropriate.	Stakeholders may include headteachers, business managers, all staff groups, trade unions, parents, pupils and corporate partners such as finance, human resources and procurement as examples.
	Local Authorities are recommended, as part of ongoing self–evaluation, to update DSM schemes if changes are made which have a consequential impact on a scheme.
	Headteachers are recommended to apply national standards and to undertake self–evaluation drawing upon the most appropriate, and current tools, at date of publication these include, but are not limited to: Education Scotland – HGIOS4 QI 1.5 Management of Resources GTC Scotland – The Standards for Leadership and Management: supporting leadership and management development Scottish Government and COSLA – Education Reform Joint Agreement and Headteachers' Charter

Appendix B – The permanent cover pool teaching resource
Introduction
Education Resources have employed a number of teachers in the Primary and Secondary school sectors for the purpose of providing absence cover for teachers who are absent for a variety of reasons including:

- Maternity leave/adoption
- Illness
- Career breaks/special leave
- Temporary Vacancies
- Long–term secondments

Permanent cover teachers are employed on the same terms and conditions of employment as class teachers but their role differs in that they are contracted to be deployed to schools within specified geographic area(s) in South Lanarkshire in response to requests for cover.

The role of Personnel Services – Employee Resourcing (ER)
Following the offer of appointment, Employee Resourcing will identify a base school and issue an employment contract detailing this and the geographic area(s) for deployment.

Requests for absence cover are submitted by Head Teachers to either the Primary or Secondary team within ER who are responsible for sourcing a cover teacher either from the permanent cover pool or temporary cover pool to fill this requirement. The teacher will then be booked out to the relevant school.

Cover teachers will be notified of this booking via email as well as the base school, the host school (the cover requirement), the relevant Support Services Co–ordinator and/or Cluster Team Officer. ER will ensure that permanent cover teachers have access and receive their ID username and password for this purpose.

Secondary permanent cover teachers may be deployed to a school for a full session as part of the Secondary School Absence Cover Scheme to cover short term absences. These arrangements are co–ordinated by the Personnel Adviser in advance of the new school year and more detail on this is also covered in a separate document located on the intranet, Education Resources/Education Personnel Information/Local Agreements/Secondary School Absence Cover Scheme.

The role of the base school
All permanent cover teachers have a base school within the geographical area(s) in which they provide cover. The base school should ensure that these cover teachers have the same status and conditions as all other teachers.

The head teacher (or named individual) in the base school should ensure that the following is in place for the cover teacher:
- an induction to the base school;
- a named contact (line manager) in their base school, in Secondary schools this would normally be the subject principal teacher;
- appropriate involvement with CPD programmes in either the base school or the host school;

- Communication with host school in the event the teacher is deployed on long–term cover to agree arrangements for PRD/CPD,
- the systems for maintaining work records and records of attendance for cover teachers;
- email and access to People Connect;
- appropriate written information on the base school's policies/procedures/practices including information on departments as appropriate;
- appropriate facilities, e.g. storage, pigeon hole, security access badge, email and intranet access;
- access to information on each school in their area(s) which is available on the intranet;
- appears on the staffing list of the base school, e.g. Jane Smith; Teacher Physics/permanent cover);

Permanent cover teachers are not considered as being on the staffing complement of the base school for the purpose of Education Resources statistics or returns; however, it is the responsibility of the named line manager within the base school to provide line management support for the cover teacher. Contact should be maintained during periods when the teacher is providing long term cover in a host school to ensure adequate support is given.

The workload of cover teachers should be monitored by their line manager especially in relation to assessments, report writing and parents' evenings. This is seen as an important aspect of the role of the base school. It is not acceptable practice for teachers providing short term cover to be involved in more parents' evenings per session than teachers based in one school. This general rule applies to all other aspects of workload.

It is essential that when the cover teacher is not providing cover either in their base school or in a host school, that they are effectively and appropriately deployed with a collapsible timetable. In particular, in secondary schools, teachers are actively involved in areas relating to their subject expertise. When necessary, cover teachers will be deployed to provide general cover acknowledging the threshold for teaching is subject specialism at least 70% of the time.

A significant majority of this time should be used for working with pupils in one or more of the following activities.
- whole class teaching
- co–operative/team teaching
- working with small groups
- developing pupils' ICT skills
- individual tuition of pupils following an absence
- reading and scribing for pupils with special educational needs
- other forms of pupil support

A small proportion of the time of a teacher providing cover may be used by the base school for developing curriculum materials either by the teacher or by covering the classes of colleagues to release time for them to be involved in curriculum development. These periods could also be used for the provision of absence cover in the teacher's department. Teachers providing cover, when in their base school, should be timetabled to attend the appropriate department meeting.

Within the Secondary sector, the number of periods a teacher providing cover could be expected to be used for cover in subjects other than their own will depend on how may periods in the week they have been timetabled for their specialist subject(s) activities up to the McCrone maximum contact time of 22.5 hours per week. The timetable of activities in a base school should be agreed by the teacher, the principal teacher(s) of the appropriate department(s) and the member of the senior management with responsibility for arranging absence cover. This balance of time used to provide general cover in the base school may be varied by agreement during the year to cope with fluctuation in the pattern of staff absence.

As a general rule teachers providing cover should spend a minimum of 70% of their class contact time involved in activities relating to their subject specialism either in their base school or in a host school.

CPD (including review discussions and CPD plan/records) is also the responsibility of the base school. Budgets for area cover teachers' CPD are in school cost centres. Where a teacher is carrying out long term cover duties in a host school, the head teachers of both schools should reach an agreement on those aspects of CPD which will be provided in each school over the period of cover in the host school. It is critical that in this situation clear arrangements are agreed to ensure the teacher's entitlement to CPD is managed.

Employee Resourcing should be notified of any situation which would mean the cover teacher is not available to be deployed. Examples of this may be PRD interviews and subsequent training courses. Notification should be emailed to either the Primary or Secondary Cover Teams at the emails listed below well in advance.

It is necessary to ensure that the appropriate record keeping is maintained in support of the Maximising Attendance Policy as is with all members of teaching staff. This should include ensuring appropriate contact is maintained between the permanent cover teacher and the head teacher or named individual (phone call on day 1 and day 4 of absence, if not returning by 7th day a subsequent phone call followed by a medical certificate), a return to work interview (either by telephone or face to face) and offering any appropriate South Lanarkshire Council supports etc. Employee Resourcing should be kept informed of any absences to ensure the booking system is accurate. Absences should be recorded on Click and Go by the base school.

Personnel administration associated with the teacher, e.g. Travel expenses, supporting cover teachers in the day–to–day issues which arise relating to conditions of service.

Travelling expenses are calculated from the base school to other schools at the start of or at the end of the school day. The authority will reimburse teachers whose travel costs are more than £18.90 per week or whose mileage amounts to more than 150 miles per week (or proportion thereof) This will be the actual public transport costs incurred using the most cost–effective public transport fare, e.g. season ticket or mileage allowance in respect of the additional mileage actually incurred. The mileage allowance is based on the public transport rate, currently 20p per mile. Travel claim forms should be endorsed by the head teacher of the base school who will submit them on a monthly basis to the Personnel Services.

The role of the host school
Where permanent cover teachers provide cover in another school in the area(s), this school is known as the host school. In exceptional circumstances teachers may be required to provide cover in host schools out with their normal area(s).

Where a teacher is carrying out long–term cover in a host school, agreements should be made with the base school to share the responsibilities of the base school.

Agreements on shared responsibilities should be discussed with the teacher concerned and all agreements communicated effectively to the teacher.
Wherever possible, teachers visiting a department/class for the first time are introduced to the pupils and to colleagues.

- Teachers have appropriate facilities, e.g. storage, pigeon hole, security access, badge in each school as required.
- Teachers have appropriate written information on the host schools' policies/procedures/practices including information on departments as appropriate.
- Where a teacher is providing long–term absence cover in a host school it may be appropriate to have the teacher's name on the school timetable.

Managing the provision of absence cover
All requests for cover should be submitted using the relevant authorisation process that should be fully completed and emailed to the appropriate team in Employee Resourcing, Personnel Services. The documentation and guidance are available on the intranet under Education Resources/Education Resources Personnel Service/Employee Relations/Local Agreements/Provision of teacher cover in schools (Appendix 1) (Education Resources).

ER will ensure that all those involved, i.e. the teacher, the base school and the host school are simultaneously informed of the deployment, and changes in the deployment of teachers providing cover. All permanent cover teachers have email addresses that can be accessed by any computer linked to the internet. On some occasions, other contact methods (e.g. phone, fax or letter) may have to be used.

If cover is required for longer than originally requested, ER must be notified. Otherwise, the cover teacher may be deployed elsewhere.

Responsibility of the permanent cover teacher
- To check their email on a regular basis — this is the main method of communicating new booking details plus other information needed to be circulated throughout the year. These emails can be accessed from any computer with internet access. Any issues regarding internet access should be communicated to the ICT Co–ordinator.
- If a booking is to be extended the permanent cover teacher will receive a further email informing of the extension. If this is not received, they should contact ER for clarification.
- All teachers providing cover may find themselves at times in the situation where they are engaged in providing general cover.
- Teachers providing cover may be requested to make a similar level of contribution to cross–curricular activities e.g. PSE, learning support, behaviour support as other staff in their base school. The practice in this area will vary from school to school. However, in all situations it would be expected that the same level of support for these activities is available to teachers providing cover as for teachers in the base school.
- When unable to attend work through illness or for other reasons the permanent cover teacher should telephone their base school head teacher or named individual. The base school should notify host school.

Non class contact time

The maximum class contact time for a teacher providing cover is determined by their contract. This means that the maximum contact time for a full–time teacher is 22.5 hours per week, and for a teacher working 0.5 the maximum contact time is 11.25 hours per week.

Local arrangements should ensure that permanent cover teachers' role do not exceed the maximum class contact time.

The national agreement makes provision for teachers to undertake some duties out with school. Appropriate arrangements should exist within each school to ensure that teachers inform their appropriate line manager when they may not be in school. This may include, for example, the use of a 'signing out' book. Permanent cover teachers will be allocated a "base school" in liaison with personnel.

Depending on the nature of the absence being covered by a permanent cover teacher it may be necessary for the head teacher to adjust timetables on a day–to–day basis. However, in these extreme circumstances staff will not be required to undertake more than 22.5 hours of pupil contact.

Class contact cover timetables for all teachers should be arranged in a minimum of 45–minute blocks of time. However, it is recognised that there may be occasions when this is not possible, in particular where short term cover is required. Local arrangements should be agreed in dialogue with the establishment management team and the permanent cover teacher.

Timetabling over a period of school sessions should ensure equity for all teachers.

Timetables will not be changed to reflect development days or holidays or the absence of an individual class teacher.

Contact Details

Primary

Email   primaryareacover@southlanarkshire.gov.uk

Contact Numbers Employee Resourcing: 01698 45 4650

Mobile: 07880174955

(For emergency cover only between 8.00 am and 8.45 am)

Secondary

Email   secondaryareacover@southlanarkshire.gov.uk

Contact Numbers Employee Resourcing: 01698 45 4650

Mobile: 07880174954

Appendix C – Teacher cover reason codes and funding rates

Reason code	Reason description	Ledger code	Supply daily rate
21	Short–Term Absence (<21 Days)	Cover–HQ Funded	£195
22	Long–Term Absence (>20 Days)	Cover–HQ Funded	£195
23	Short–Term Absence (<11 Days)	Cover–School Funded	£195
24	Long–Term Absence (>9 Days)	Cover–HQ Funded	£195
30	Maternity/Adoption Annual Leave	Cover–HQ Funded	£195
31	Maternity Leave	Cover–HQ Funded	£195
32	Adoption Leave	Cover–HQ Funded	£195
33	Maternity Support Leave	Cover–HQ Funded	£195
36	Leave of Absence (Paid)	Cover–HQ Funded	£195
41	Secondment within SLC	Teachers–Salaries	£217
42	Secondment outwith SLC	Teachers–Salaries	£227
48	CPD Others	CPD–Others	£195
67	Study Support	Supported Study	£220
72	SQA Examining Duties	SQA Examining Duties	£195
73	SQA other duties	Cover–HQ Funded	£195
74	Trade Union duties	Cover–HQ Funded	£195
76	Jury Duty	Cover–HQ Funded	£195
78	Other Business Of Authority	Cover–HQ Funded	£195
80	Small Schools Planning Group	Cover–HQ Funded	£195
81	Roll–Entitlement Posts	Teachers–Salaries	£229
85	Music Instructors	Cover–School Funded	£166
87	PEF	PEF Teacher	£250
89	SAC – Teacher	SAC Teacher	£217
90	Flexible Cover	Cover–School Funded	£195
92	Covid Cover	Cover–HQ Funded	£195
94	Bereavement Leave	Cover–HQ Funded	£195
95	Career Break Cover	Teachers–Salaries	£217

Appendix D – Pupil roll allocations methodology - Primary budget allocation

Budget	Allocation fixed element	Allocation variable roll element	Allocation other
Classroom Supplies	£519	£32.53	No. of footwear grants *£3
Cover – School funded	-	-	Core teachers *0.5 *£195
Cover – CPD	£525	-	Core teachers * £180 * 0.7 + Core teachers + spec teachers– * £180 * 0.3
Equipment and Other Tools	£133	£0.30	–
Furniture – General	£355	£0.40	–
Health and Safety – First Aider	£200	–	£285 per 1–50 Staff
Janitorial Supplies	£40	£2.67	Roll + ELC roll + (0.5 ASN roll) * £2.67
Library/Resources Centre Materials	£126	£1.24	–
PE Facilities Use/Transport	£400	£2.10	–
Postages/Couriers	£110	£0.80	Roll + ELC roll
Printing and Stationery	£60	£1.81	–
School Activities	£571	£1.16	–
Classroom Supplies Consumables	–		Fixed amount per Inclusion Service
Telephones	£93	£1.68	Roll + ASN roll
Travel and Subsistence – Teachers	£353	–	Core teachers + ASN teachers * £35
Television Licences	£159	-	-
Water Metered Charges	–	–	Water standing charge (based on meter size) + (roll * 3 cubic metres * £2.1742) Roll + ELC roll + Gaelic roll

Appendix E – Other school budgets within Entitlement

Description	Allocation other
CPD – Training	Allocation/virement from the Cover CPD
Malicious Damage	Fixed allocation to secondary schools only. Charges via the PPP contract
Cleaning Materials	Allocation/virement from the Janitorial supplies budget
Health and Hygiene Materials	New funding for Sanitary
Window Cleaning	Fixed allocation
Computer Equip Purchase	Allocation from the materials budget
IT Computer Maintenance	Allocated budget for ICT managed service
Electronic Messaging	Text message charges Allocation/virement from the material budget
Furnishings	Allocation/virement from the materials budget
Audio Visual – Library Service	Allocation/virement from the materials budget
Publications, Journals, Newspapers	Allocation/virement from the materials budget
Protective Clothing and Uniforms	Allocation/virement from the materials budget
Laundry Costs	Fixed allocation
Health and Safety	Allocation/virement from the materials budget
Catering – Outwith Contract	Allocation/virement from the materials budget
Fleet Service Charges	ASN only Fixed allocation
Hire of External Vehicles	Allocation/virement from the materials budget
Membership Fees/Subscriptions	Allocation/virement from the materials budget or Fixed allocation
Medical Costs	Allocation/virement from the materials budget
Training	Allocation/virement from the materials budget
Payments to Other Bodies	Fixed allocation (payment to chaplains)
Counselling	New funding
Management Savings	Council approved savings
ICT Equipment Leases	Allocation/virement from the materials budget

Appendix F – Professional support and contacts

Service	Contact details
Education Resources	
Education Management Team	http://intranet.southlanarkshire.gov.uk/info20471/education_management_team
	General Education support education@southlanarkshire.gov.uk
Support Services	Edsuppserv.helpline@southlanarkshire.gov.uk
	Covid-19 Educationcovid19@southlanarkshire.gov.uk
	Covid-19 educationcovidpositivecases@southlanarkshire.gov.uk
	Consultations educationconsultations@southlanarkshire.gov.uk
School Modernisation	edppp@southlanarkshire.gov.uk
Inclusion Services	ASN transport EDASNtransport@southlanarkshire.gov.uk
	General educationinclusion@southlanarkshire.gov.uk
Curriculum and Quality Improvement Service	education_qis@southlanarkshire.gov.uk
Youth Employability	Tutoring programme Careexperiencetuition@southlanarkshire.gov.uk
	General youthemployability@southlanarkshire.gov.uk
Psychological Services	General edpsychcp@southlanarkshire.gov.uk
Service	**Contact Details**
Finance and Corporate Resources	
Finance Service Unit	Education.finance@southlanarkshire.gov.uk

Service	Contact Details
Finance and Corporate Resources	
Cluster Team Officer (CTO)	See attached full contact list
Personnel Services	http://intranet.southlanark-shire.gov.uk/info/20109/homepage_info/46/en-quiry_numbers_and_tie_lines/5
Legal Services	legalservices@southlanarkshire.gov.uk
Risk Management	http://intranet.southlanark-shire.gpov.uk/imnfo/20381/risk_management
Finance Services Transactions	Procurement.service@southlanarkshire.gov.uk
Community and Enterprise Resources	
Facilities CER Facilities Officer	See attached structure

Finance Service Unit –	Schools' finance cluster Team Officer (CTO) contacts	As at February 2022
School	Sector	CTO
Abington Primary School	Primary	Jill Mitchell
Auchengray Primary School	Primary	Jill Mitchell
Auchinraith Primary School	Primary	Gerry Weatherall
Auldhouse Primary School	Primary	Elizabeth McGown
Bankhead Primary School	Primary	Jean Mullen
Beckford Primary School	Primary	Kay Campbell
Bent Primary School	Primary	Jill Mitchell
Biggar Primary School	Primary	Jill Mitchell
Black Mount Primary School	Primary	Jill Mitchell
Blacklaw Primary School	Primary	Diane Litterick
Blackwood Primary School	Primary	Jill Mitchell
Bothwell Primary School	Primary	Linda Leggate
Braehead Primary School	Primary	Fraser Whyte
Braidwood Primary School	Primary	Fraser Whyte
Burgh Primary School	Primary	Jean Mullen
Burnside Primary School	Primary	Jean Mullen
Cairns Primary School	Primary	Diane Wilson
Calderwood Primary School	Primary	Kathy Dolan
Canberra Primary School	Primary	Diane Wilson
Carluke Primary School	Primary	Fraser Whyte
Carmichael Primary School	Primary	Fraser Whyte
Carnwath Primary School	Primary	Jill Mitchell
Carstairs Junction Primary School	Primary	Fraser Whyte
Carstairs Primary School	Primary	Fraser Whyte
Castlefield Primary School	Primary	Pamela Quinn
Cathkin Primary School	Primary	Linda Leggate
Chapelton Primary School	Primary	Pamela Quinn
Chatelherault Primary School	Primary	Kay Campbell
Coalburn Primary School	Primary	Jill Mitchell
Coulter Primary School	Primary	Jill Mitchell
Craigbank Primary School	Primary	Caroline Donachie
Crawford Primary School	Primary	Jill Mitchell

School	Sector	CTO
Crawforddyke Primary School	Primary	Fraser Whyte
Crosshouse Primary School	Primary	Pamela Quinn
Dalserf Primary School	Primary	Caroline Donachie
David Livingstone Memorial	Primary	Diane Wilson
Douglas Primary School	Primary	Fraser Whyte
East Milton Primary School	Primary	Diane Wilson
Forth Primary School	Primary	Fraser Whyte
Gilmourton Primary School	Primary	Pamela Quinn
Glassford Primary School	Primary	Elizabeth McGown
Glengowan Primary School	Primary	Caroline Donachie
Glenlee Primary School	Primary	Diane Wilson
Greenhills Primary School	Primary	Diane Wilson
Halfmerke Primary School	Primary	Janet Jackson
Hallside Primary School	Primary	Diane Wilson
Hareleeshill Primary School	Primary	Diane Litterick
Heathery Knowe Primary School	Primary	Diane Litterick
High Blantyre Primary School	Primary	Diane Wilson
High Mill Primary School	Primary	Fraser Whyte
Hunter Primary School	Primary	Diane Litterick
James Aiton Primary School	Primary	Diane Wilson
Kirkfieldbank Primary School	Primary	Fraser Whyte
Kirklandpark Primary School	Primary	Elizabeth McGown
Kirkton Primary School	Primary	Fraser Whyte
Kirktonholme Primary School	Primary	Kathy Dolan
Lamington Primary School	Primary	Jill Mitchell
Lanark Primary School	Primary	Fraser Whyte
Law Primary School	Primary	Fraser Whyte
Leadhills Primary School	Primary	Jill Mitchell
Libberton Primary School	Primary	Jill Mitchell
Loch Primary School	Primary	Diane Wilson
Long Calderwood Primary	Primary	Janet Jackson
Machanhill Primary School	Primary	Caroline Donachie
Maxwellton Primary School	Primary	Diane Litterick
Milton Primary School	Primary	Jill Mitchell

School	Sector	CTO
Mossneuk Primary School	Primary	Pamela Quinn
Mount Cameron Primary School	Primary	Janet Jackson
Mount Cameron Primary School Gaelic Unit	Primary	Janet Jackson
Muiredge Primary School	Primary	Linda Leggate
Murray Primary School	Primary	Janet Jackson
Neilsland Primary School	Primary	Kay Campbell
Netherburn Primary School	Primary	Caroline Donachie
New Lanark Primary School	Primary	Fraser Whyte
Newfield Primary School	Primary	Caroline Donachie
Newton Farm Primary School	Primary	Linda Leggate
Our Lady and St Anne's Primary School	Primary	Gerry Weatherall
Our Lady of Lourdes Primary School	Primary	Diane Litterick
Park View Primary School	Primary	Diane Wilson
Quarter Primary School	Primary	Kay Campbell
Rigside Primary School	Primary	Fraser Whyte
Robert Owen Memorial Primary School	Primary	Fraser Whyte
Robert Smillie Memorial Primary School	Primary	Janet Jackson
Sandford Primary School	Primary	Pamela Quinn
South Park Primary School	Primary	Pamela Quinn
Spittal Primary School	Primary	Kathy Dolan
St Anthony's Primary School	Primary	Jean Mullen
St Athanasius' Primary School	Primary	Gerry Weatherall
St Blane's Primary School	Primary	Linda Leggate
St Bride's Primary School (Bothwell)	Primary	Gerry Weatherall
St Bride's Primary School (Cambuslang)	Primary	Jean Mullen
St Cadoc's Primary School	Primary	Jean Mullen
St Charles Primary School	Primary	Jean Mullen
St Columbkille's Primary School	Primary	Jean Mullen
St Cuthbert's Primary School	Primary	Linda Leggate
St Elizabeth's Primary School	Primary	Gerry Weatherall
St Hilary's Primary School	Primary	Diane Litterick
St John The Baptist Primary School	Primary	Gerry Weatherall
St John's Primary School (Blackwood)	Primary	Gerry Weatherall
St John's Primary School (Hamilton)	Primary	Kay Campbell

School	Sector	CTO
St Joseph's Primary School	Primary	Linda Leggate
St Kenneth's Primary School	Primary	Diane Litterick
St Leonard's Primary School	Primary	Diane Litterick
St Louise's Primary School	Primary	Diane Litterick
St Mark's Primary School (Hamilton)	Primary	Linda Leggate
St Mark's Primary School (Rutherglen)	Primary	Jean Mullen
St Mary's Primary School (Hamilton)	Primary	Gerry Weatherall
St Mary's Primary School (Lanark)	Primary	Gerry Weatherall
St Mary's Primary School (Larkhall)	Primary	Gerry Weatherall
St Ninian's Primary School	Primary	Linda Leggate
St Patrick's Primary School	Primary	Gerry Weatherall
St Paul's Primary School	Primary	Gerry Weatherall
St Peter's Primary School	Primary	Linda Leggate
St Vincent's Primary School	Primary	Diane Litterick
Stonehouse Primary School	Primary	Linda Leggate
Tinto Primary School	Primary	Jill Mitchell
Townhill Primary School	Primary	Kathy Dolan
Udston Primary School	Primary	Diane Wilson
Underbank Primary School	Primary	Fraser Whyte
West Coats Primary School	Primary	Diane Wilson
Wester Overton Primary School	Primary	Elizabeth McGown
Wiston Primary School	Primary	Jill Mitchell
Woodhead Primary School	Primary	Kay Campbell
Woodpark Primary School	Primary	Jill Mitchell
Woodside Primary School	Primary	Kay Campbell
Biggar High School	Secondary	Jill Mitchell
Calderglen High School	Secondary	Janet Jackson
Calderside Academy	Secondary	Caroline Donachie
Carluke High School	Secondary	Fraser Whyte
Cathkin High School	Secondary	Jean Mullen
Duncanrig Secondary School	Secondary	Linda Leggate
Hamilton Grammar School	Secondary	Kay Campbell
Holy Cross High School	Secondary	Gerry Weatherall
Lanark Grammar School	Secondary	Fraser Whyte

School	Sector	CTO
Larkhall Academy	Secondary	Caroline Donachie
Lesmahagow High School	Secondary	Jill Mitchell
St Andrew's and St Bride's High School	Secondary	Diane Litterick
St John Ogilvie High School	Secondary	Diane Wilson
Stonelaw High School	Secondary	Kathy Dolan
Strathaven Academy	Secondary	Pamela Quinn
Trinity High School	Secondary	Jean Mullen
Uddingston Grammar School	Secondary	Linda Leggate
Greenburn School	Special – Primary	Diane Litterick
Hamilton School for the Deaf	Special – Primary	Gerry Weatherall
Kear Campus	Special – Primary	Kay Campbell
Victoria Park School	Special – Primary	Fraser Whyte
West Mains School	Special – Primary	Janet Jackson
Greenburn School	Special –	Diane Litterick
Kear Campus	Special –	Kay Campbell
Rutherglen High School	Special –	Kathy Dolan
Sanderson High School	Special –	Janet Jackson

Facilities Management support structure

Title	Name	Mobile No
Manager	Anne Goldie	07795090278
Adviser	Sandy McGinness	07795453764
Officer South 1	Sharon Borland	07795453407
Officer South 2	Julie Marshall	07825830915
Officer South 3	Gary Convery	07795090752
Officer Compliance, Staffing SXP	Stuart Andrew	07795090314
Assistant Officer	Lorna Carmichael	tbc
Assistant Officer	Julie Scott	07795453815
Assistant Officer	Carol Whitelaw	07795453820
Assistant Officer	Sharon Minto	07795090277
Advisor	Isabel Veitch	07795090755
North 1	Christine Penman	07795453818
Officers North 2	Ishbel Gowen	07795453819
Officers North 2	Fiona Brown	07385487794
Officer North 3	Duncan Sinclair	07757541394
Officer Menu Development	Carla Sommerville	07917091043
Assistant Officer	Pauline Wilson	07795090303
Assistant Officer	Janet Cunningham	07795090272
Assistant Officer	Margaret Shand	07795453811
Assistant Officer	Sarah Hunter	07795453857
Assistant Officer	Amanda Bryce	07795453822
Assistant Officer	Margaret Shand	07795455437
Advisor	Katie Fraser	07795453778
Officer H.S.1	Melanie Sneddon	07795453759
Officer H.S.2	Gregor Mitchell	07385516120
Officer Principle Offices	Alison Johnston	07900678230
Officer South 4	Lesley McGhie	07881617842
Assistant Officer	Karen Lamond	07795453817
Assistant Officer	Debbie Ballantyne	07795455437
Assistant Officer	M Anderson	07795090247
Assistant Officer	Agnes Pirrie	07795090280
Assistant Officer	Lynne McNicol	7795453816