

FOREWORD

The *School Office Operational Handbook* is intended for use as a reference source and guide to the policies and processes associated with the management of staff and the operational running of a school office.

It is also intended to welcome new employees to the Education Department and to provide general information about Comhairle Nan Eilean Siar and the Education Department.

Copies of the Handbook will be distributed to each school, where it should be retained in the school office and made available to staff on request. Where possible, the Handbook should be kept up-to-date; and to allow for ease of access and updating it is intended to make the Handbook available in electronic form so that it can be accessed from a public folder on Edukit

If you require any further information or if you find that there is information that is either incorrect or missing, please contact your Business Support Officer.

The Handbook is split into two distinct categories:

- Sections A to K - Office Procedures
- Sections L to R - Human Resources

We do hope you find the Handbook useful.

I. SECTIONS A TO K - OFFICE PROCEDURES

Clearly defined, understood and properly implemented office procedures are crucial elements in helping the school work smoothly and effectively. Sometimes staff use these procedures so smoothly that it is only at times of staff absence that their importance is highlighted. One purpose of this handbook is to clarify and highlight procedures and offer examples of best practice.

We hope that this handbook will

- assist school staff;
- provide a basis for the self evaluation of the quality of existing school office support;
- enable improvements to be built on this evaluation;
- encourage the easy transmission of good practice at school level so that it moves from any set of habits developed over time and held in the memory to being written down and accessible to other colleagues;
- be a resource for use by relief staff/other school staff covering an absence to ensure that key procedures can be maintained at such times.

I. SECTIONS A TO K - OFFICE PROCEDURES (Continued)

While the handbook describes Council procedures it is written so that support staff in schools can add relevant local school information e.g. where are various forms and stationery kept, what is the timetable of itinerant staff, how do you greet the public on the phone etc? This is of course particularly important for new/relief staff and it is essential to take the time to provide this information for your own school. Appendix I – School Inserts - summarises what you need to complete.

This Office procedures handbook covers procedures that support the whole school and can happen outwith the office. Cash handling can happen in the classroom and visitor procedure needs to be understood by all support staff. It therefore needs to be accessible to all support staff operating outwith the office who may be involved with any of the tasks mentioned in the handbook.

The main value of this section of the handbook will be if it is an easy guide on what to do and how to do things well on a daily basis. It is not regarded as definitive and your ideas and contributions on how to improve it are very much welcomed. Useful suggestions will be included in updates.

II. SECTIONS L TO R - HUMAN RESOURCES

These sections of the *School Office Operational Handbook* are intended as a Human Resources reference guide for all school support staff; to inform them about some of the employment rules, policies and procedures under which we operate. They should be used in conjunction with the Comhairle's Employment Handbook, which can be accessed through the Comhairle's Intranet:

Council Information/Corporate Services/Personnel and Training/Employment Handbook

The Employment Handbook covers all local policies and procedures set in place by Comhairle Nan Eilean Siar as regards management of staff.

Questions regarding interpretation of sections L to R of the *School-Office Operational Handbook* should be directed, in the first instance, to your Business Support Officer. If questions remain, your Business Support Officer will consult with the Principal Officer (Secondary Education and Human Resources) who, in turn, may require to consult with the relevant member of the Comhairle's Personnel Section.

The Human Resources sections of the Handbook will, periodically, be updated but there will be times when policy will change before the contents of the handbook are revised. Staff should be able to keep up-to-date with changes by accessing the Comhairle's on-line Employment Handbook (see above for details) or the Education Department website:

Council Information/Education/Policies & Procedures

III. BUSINESS MANAGER/BUSINESS SUPPORT OFFICERS

Throughout this handbook, reference will be made to contacting your Business Support Officer.

A Business Support Officer's role is to provide administrative, financial and general support to schools in all non-curricular aspects including operational and policy issues and to process any related administrative and financial tasks at Departmental level. They are line managed by the Principal Officer (Secondary Education and Human Resources), Tel. No. 01851 709 447. The range of tasks covered by these posts is outlined at Appendix II, together with details of the person who services each school at Appendix III.

Where reference is made to contacting your Business Support Officer, support staff at The Nicolson Institute should contact their Business Manager.

IV. ACKNOWLEDGEMENTS

Thanks very much to all the schools who contributed ideas for this project and to Eriskay School for kind permission to use their staff handbook.

Appendix	Subject
Appendix I	School Inserts
Appendix II	Business Support Tasks
Appendix III	Business Support School Allocation

V. SOURCES OF INFORMATION

Bulky and hefty folders do not lend themselves to easy handling and use. A deliberate effort has been made to keep things brief by referring, where necessary, to other sources of information for a fuller explanation of policies, procedures and so on.

The main additional sources will be:

CNES WEBSITE

The Comhairle's website can be accessed at www.cne-siar.gov.uk. Schools also have access to the Comhairle's Intranet site at the same web-site address.

CNES EMPLOYMENT HANDBOOK

The Employment Handbook covers all local policies and procedures set in place by Comhairle Nan Eilean Siar as regards management of staff. The Handbook can be accessed through the Comhairle's Intranet site:

Council Information/Corporate Services/Personnel and Training/Employment Handbook

CNES EDUCATION DEPARTMENT WEBSITE

The Education Department website can be accessed at the Comhairle's Intranet site:

Council Information/Education

GREENS SCOTTISH EDUCATION MANUAL (SEM)

On behalf of schools, the Education Department subscribes to the Scottish Education Manual (Green's). The subscription gives schools one hard copy of the manual which is updated twice yearly. The subscription also includes unlimited site (ie school) access to the SEM online at www.wgreenregulatory.co.uk. Any staff member or pupil can access the site (at the school) using user IDs and passwords which are notified to schools by the Education Department. The online version of the SEM is updated more frequently than the hard copy volume and also contains information on educational developments and news nationally.

SCHOOLS ADMINISTRATION HANDBOOK (SAH)

The SAH has been issued to all schools. The handbook complements Green's Scottish Education Manual by excluding the legal content of Green's and reflecting mainly local policies. The contents of the SAH can be found at the Education website:

Council Information/Education/Policies and Procedures.

We would encourage all employees to visit both the Comhairle and Education Department websites, frequently, as the sites are continuously being updated.

SCHOOL INSERTS**Appendix I**

School Insert	Topic	Date insert Completed
A1	Telephone Use	
A3 (a)	Using the Fax	
A3 (b)	Using the Photocopier	
A4	Location of Stationery/Forms	
A5 (a)	Filing System – Paper Based Files	
A5 (b)	Filing System – Computer Based Files	
A6	E-Mail Procedures	
A8 (a)	Regular Tasks – Monthly	
A8 (b)	Regular Tasks – Weekly	
A8 (c)	Regular Tasks – Daily	
A8 (d)	Regular Tasks – Periodically	
A9	Pupil, Parent and Staff Lists	
B3	Alarms	
B4	Passwords	
B5	Secure Cash Handling	
C1	Arrangements for Recording Pupil Attendance and Entering in Phoenix	
C2	Access to FMS	
E2	Pupil illness during the school day (procedures)	
E3	Emergency school closure (Administrative Arrangements)	
F1 (a)	Fault Reporting – School Procedure	
F1 (b)	Fault Reporting – Monitoring Sheet	
I2	School Uniform for Pupils – Administrative Arrangements	
J1	Child Protection – School-level Guidance for Support Staff	

Appendix II

BUSINESS SUPPORT TASKS

ADMINISTRATION

Item	Action
<i>School Handbook</i>	<ul style="list-style-type: none"> • Provide advice and guidance to Head Teacher on content and circulation of handbooks and assist with production administration
<i>Inventories</i>	<ul style="list-style-type: none"> • Provide advice and guidance to Head Teachers on content and maintenance of inventories. Ensure procedures and systems are efficient and productive
<i>Statistics and returns</i>	<ul style="list-style-type: none"> • Provide advice and assistance on requirements and completion of statistics and information to be provided for SEED, Education Department and School Boards
<i>ICT</i>	<ul style="list-style-type: none"> • Identify needs, liaise with IT support staff. Identify and schedule training
<i>Pupil Transfer</i>	<ul style="list-style-type: none"> • Ensure pupil transfers are followed through with regard to SMIS and electronic transfer
<i>Attendance at meetings</i>	<ul style="list-style-type: none"> • Attend meetings of school, community or parent groups as requested by Head Teacher in connection with relevant issues
<i>Non-curricular policies</i>	<ul style="list-style-type: none"> • Develop standard written procedures and guidelines for schools in line with Comhairle/Departmental policies/procedures
<i>Organisation of events</i>	<ul style="list-style-type: none"> • Co-ordinate and organise cluster meetings/events/etc on behalf of the school

FINANCE

Item	Action
<i>School budgets and expenditure</i>	<ul style="list-style-type: none"> • Provide assistance and guidance to Head Teachers on budget management/value for money purchasing strategies. • Undertake high level monitoring of commitment/expenditure for Head Teachers and ensure expenditure statements can be produced at school level. • Discuss and action budget virements, journal transfers and carry forwards
<i>Financial procedures</i>	<ul style="list-style-type: none"> • Provide advice and guidance on Comhairle and Departmental financial procedures to Head Teachers. • Introduce systems which meet financial requirements. • Liaise with Resources Section of the Department on behalf of the school.
<i>School funds</i>	<ul style="list-style-type: none"> • Provide general advice and guidance on requirements to Head Teacher. • Provide assistance in preparation of school fund account. • Ensure procedures are in line with Comhairle Financial Regulations and Departmental guidance.

Appendix II (continued)

HEALTH AND SAFETY

Item	Action
<i>School policies and procedures</i>	<ul style="list-style-type: none"> Assist with the preparation of draft general policies and procedures for schools.
<i>Risk assessment/ Inspections</i>	<ul style="list-style-type: none"> Assist and advise on the process of risk assessments as required.
<i>Training and resource requirements</i>	<ul style="list-style-type: none"> Co-ordinate identified Health and Safety training needs and schedule as necessary.

REPAIRS AND MAINTENANCE

Item	Action
<i>DSM budget</i>	<ul style="list-style-type: none"> Assist Head Teachers in identifying and prioritising devolved budget programme prior to discussion with Handyman/Technical Services.
<i>Fault Reports</i>	<ul style="list-style-type: none"> Progress chase on behalf of Head Teachers. Monitor school property logs to ensure there is an effective audit process in place.
<i>Property issues</i>	<ul style="list-style-type: none"> Contribute to the process of asset management and the assessment of needs within the schools so that prioritisation of planned maintenance spending is based on rigorous evidence.
<i>Handyperson</i>	<ul style="list-style-type: none"> Monitor and develop handyperson service to ensure effective and efficient use of DSM/Repairs and Maintenance budgets.

SCHOOL BOARDS

Item	Action
<i>Meetings</i>	<ul style="list-style-type: none"> Attend meetings of board as required and process relevant issues/decisions.
<i>Correspondence</i>	<ul style="list-style-type: none"> Provide advice and guidance to boards on policy matters concerned with individual schools.
<i>Elections</i>	<ul style="list-style-type: none"> Collection and validation/scrutiny of forms, school rolls and data for SMIS and central processing. Maintain membership knowledge and advise on terms of office.
<i>Training</i>	<ul style="list-style-type: none"> Ensure training is arranged and delivered to School Board members.

Appendix II (continued)

STAFFING (NON-TEACHING)

Item	Action
<i>Appointments</i>	<ul style="list-style-type: none"> • Arrange and attend interviews in conjunction with Head Teacher. • Provide guidance and advice to Head Teachers on recruitment procedures/ conditions of service/disciplinary and grievance procedures. • Process relevant personnel and financial documentation relating to staff issues.
<i>Clerical Staff</i>	<ul style="list-style-type: none"> • Assist and advise clerical staff on IT systems and procedures and liaise with Department's IT co-ordinator.
<i>All non-teaching staff (excluding catering/cleaning staff)</i>	<ul style="list-style-type: none"> • Examine and standardise work systems, undertake Staff Development and Appraisal interviews in relation to APTC staff and identify and schedule development needs. • Ensure that there are appropriate induction procedures in place for new staff. • Ensure that the deployment of non-teaching staff is utilised to benefit the learning environment.

OTHER

Item	Action
<i>School security</i>	<ul style="list-style-type: none"> • Discuss with Head Teacher school security issues and any planned works. • Ensure sustainable procedures are in place and review on a regular basis.
<i>Transport</i>	<ul style="list-style-type: none"> • Liaise with Technical Services to assist with school transport issues/problems.
<i>Building Cleaning</i>	<ul style="list-style-type: none"> • Undertake general monitoring of building cleaning on each visit and report any findings to Building Cleaning section of the Department.

Appendix III

BUSINESS SUPPORT - ALLOCATION OF SCHOOLS

School	Business Support Officer	Contact Number
The Nicolson Institute	<i>Anne Morrison (Business Manager)</i>	01851 70 2275; or 01851 70 7014
Aird, Balallan, Bayble, Bernera, Knock, Laxdale, Sandwickhill, Sgoil nan Loch, Pairc, Uig, Cliasmol, Leverhulme Memorial, Scalpay	<i>Anne Maciver</i>	01851 709 427; or 07786 3355 03
Airidhantuim, Back, Barvas, Bragar, Breasclate, Carloway, Cross, Lionel, Shawbost, Stornoway Primary, Tolsta, Tong, Shelibost, Sir E Scott	<i>Margaret Macleod</i>	01851 709 498; or 0776 967 2246
All Uist and Barra schools	<i>Douglas Reid</i>	01870 60 3566; or 07769 671 883