The Highland Council	Agenda Item	10.
Education, Children and Adult Services Committee 28th August 2014	Report No	ECAS/26/14

School Office Review

Report by Director of Care and Learning

Summary
This report provides members with an update on the work of the school office review group and recommends a project trial.

1.   **Background**

1.1   During a period of significant change in the curriculum it is essential that support functions in the schools sector are organised in the most efficient and effective manner to support the delivery of learning and teaching. The school office is an integral part of every school and it is therefore essential that the importance of this function is recognised and consolidated in pursuit of the above objective. It is also important that the good work being carried out by the existing school office staff is recognised and that opportunities are taken to further enhance and build upon this essential role. The Council has already agreed a financial saving target related to the school office function, and it is expected this project, in time, will deliver cost efficiencies in addition to service improvements.

1.2   The report to the February 2014 Adult & Children Services Committee identified a number of themes and work-streams in relation to the school office project which are outlined in **Appendix 1** for ease of reference.

1.3   Section 2 of the report outlines the progress achieved since the previous Committee in relation to the themes and work-streams identified at that time. Section 3 outlines the key initiatives that have emerged from the work with office staff and other stakeholders to improve the School office service. Section 4 outlines proposals to trial these initiatives which will help inform the future strategic direction of the school office function, the structures required to discharge the function as efficiently and effectively as possible and the creation of an operating model that meets the needs of the diverse and geographically challenging school estate that exists in the Highlands. Section 5 outlines the extensive engagement with practitioners and other stakeholders during the trial period.

2.   **Progress since the February Committee**

2.1   Since February an extensive series of workshops have been held with school office staff to develop the main themes and categories of work. Workshops targeted a specific theme (e.g. managing interruptions) of the office functions previously identified. Using a variety of techniques each workshop identified and explored various remedies and actions that could be undertaken to resolve, improve, eliminate or transform office functions. Where appropriate those ideas were further evaluated and developed by a subsequent workshop.

2.2   The keen participation of 106 office staff from 75 schools ensured a wide

representation throughout the school network and all grades of staff. In addition, technical experts (e.g. Web development and I.T.) and other relevant project staff (e.g. Information Management) participated.

2.3   The project has continued to engage with corporate projects and initiatives where appropriate to understand and co-operate on the management of the impact of those initiatives on this project. There has been engagement with representatives from the Head Teachers Executive Groups as well as Trades Union representatives throughout the project.

2.4   The significant engagement has directly contributed to and shaped the work done so far. This substantial piece of work has now been collated into a series of initiatives and the project proposes these be trialled.

3.   Key initiatives and issues

3.1   Through the use of up to date communications technologies including web, blog, email and text, parents will be able to access and receive information in the ways that best suit them. Whilst phoning the school will be still an option many parents will prefer these alternative options and there will be fewer calls to the school for basic information. The ability to make online payments to school accounts (trips etc.) would also reduce the workload in schools.

3.2   Telephony and I.T. vary considerably across schools and affect their smooth running. Through the planned replacement and better utilisation of their capability, improvements will be sought in how calls are managed. Use of some wireless devices and the new Lync office communicator system for internal communications to staff, will enable better management of certain tasks.

3.3   Access and security issues at some schools force time-consuming and frustrating procedures for staff to maintain security and will be addressed. This might include repositioning door release switches or establishing cameras on doors.

3.4   There is no single source of information on how office staff could or should be carrying out many of their duties. Staff access assistance through a variety of informal sources. This may involve contacting known contacts or emailing a number of people asking for help. Staff may, or may not, receive timely accurate responses and delays. As a result, frustration in completing some tasks was frequently quoted. Office staff therefore require a single repository of all the up to date information they need. This resource would include the correct versions of forms, procedures; links to useful resources, online training frequently asked questions and expert forums. This should be developed as soon as possible.

3.5   Office staff in Primary Schools report to their Head Teacher and may have little contact with their peers or have the ability to share experience and best practice. Few staff have performance reviews and development plans. The creation of a senior office staff role responsible for co-ordinating these duties would result in operational improvements, beneficial to office staff and Head Teachers. It is proposed that such a role would undertake a more senior role in running the school office, providing developmental support to staff, identifying best practice and leading its introduction. They would lead a group of school offices and identify where support is required to ensure the best management of the duties required.

3.6   As a consequence of the themes outlined, schools would have a clear and consistent set of policies and procedures which could be monitored and improved. Providing the correct resources will ensure staff are able to access information and assistance they need in a more timely way. With this organisation in place there would be greatly increased opportunities to provide support and flexibility across schools enabling for example cover for office staff absence.

3.7   As a longer term vision there may be opportunities to look at the school office in a wider community context. Schools are at the epicentre of a community and a variety of additional services could be administered or offered from schools to support Council service delivery. The correct facilities would require to be in place. The development of community campus schools is an example of the direction Care & Learning is taking in this area already. This approach could be particularly valuable in rural and remote communities. Key school office staff already have many of the skills required to provide these services and further training and systems knowledge could be delivered. The school could also host other personnel providing such services. Provision of these services would preserve the point of presence and jobs currently in place in schools. This provision would also satisfy the desire to provide Council services locally when needed and would demonstrate further integration of these services.

3.8   These potential capabilities and opportunities could see the role of office support strengthened and indeed increase the presence of office staff in schools. While this is a longer-term vision, the trial approach and post-trial review, should provide the necessary base on which these opportunities can be further explored.

4.   The next phase – Trial of initiatives in an Associated School Group (ASG) area

4.1   The project intends to proceed to a trial phase. The themes will be trialled in two ASGs, rural and urban, and will have a staggered start.

4.2   The trial will mark a new strategic direction determining a unique identity and status for the school office function, moving away from the "silo" model.
It will promote collaboration and integration with other schools within a defined geographical area. It will seek collaboration and better integration with other specialist teams.

4.3   For the purposes of the trial, the school office structure in the trial area will have a matrix style management whereby the Head Teacher retains control of day to day management. The existing role of Administrative Assistant will, for the trial period only, be replaced by a higher graded Team Leader role, which will have greater responsibility and a wider remit. This senior role would be responsible for supporting and developing office staff in the ASG, introducing best practice and developing a network approach to the ASG workload. Roles, responsibilities and structure will be developed and refined throughout the trial.

4.4   The new operating model is defined by the themes outlined. A continuous review and refinement process will operate on the model throughout the trial. The trial has the objective of demonstrating improvements through:

•   Consistency via documented policies and procedures
•   Sharing good practice and embedding a culture of continuous improvement
•   Establishing a sustainable operating model that creates capacity and

delivers the project objectives

- Formalising links and interfaces with other specialist teams, both within the Service and with corporate teams
- Ensuring that the available systems are used to maximum benefit and that the levels of training and support relating to the optimum use of systems is provided and maintained.

4.5   The outline of tasks for the next phase are:

- Establish one "rural" and one "urban" ASG trial during academic year 2014/15
- Appoint Senior Office Staff Member for area as a temporary post for the trial (Team Leader)
- Establish base-line and success criteria
- Measure success - identify areas for improvement and development
- Ensure that "tools for job" are available to enhance chances for success
- Ensure that sufficient resources are available to support ASG selected for trial period
- Assess impact and plan for integration of the significant corporate changes being implemented during this academic year which will have a significant impact on the school office – SEEMIS, a new corporate Financial system and the implementation of the integrated payroll/personnel system
- Initial evaluation by Easter 2015 with further work post review
- Recommendations for further implementation phases presented to Committee in May 2015.

4.6   The Schools Office Review Project Manager will provide an ongoing support and mentoring role to the trial ensuring the correct resources and engagement processes are in place. In addition he will provide a mentoring role to the team leader.

5.   Engagement with practitioners during trial period

5.1   Building on the extensive engagement approach thus far, the trial will be monitored and reviewed throughout. An engagement process will be in place providing an opportunity for Head Teachers, schools office staff and Parent Council representatives in the area to participate.

5.2   Due to the number of practitioners and stakeholders likely to be involved additional channels of communication and consultation will be established. This will include the Head Teacher representative groups, Trades Unions, and technical and project specialists amongst others. Members will be informed of progress via committee report.

6.   Conclusions

6.1   The proposed model will create a more effective environment better suited to the demands on the office from school staff and parents. By creating the appropriate structure and support mechanisms, as well as utilising appropriate communication channels and better use of IT, the school will be better able to meet the needs of staff, pupils and parents. At a time of rapid change in the way education is delivered, the school office too must have the correct mechanisms in place to support learning and teaching.

6.2   As outlined earlier with the correct environment in place there would be the opportunity to examine synergies at a community and corporate level to deliver services locally, enhancing availability and quality of service with the potential for further savings overall to the Council.

7.   Implications

7.1   Resources

7.1.1   The baseline budget for providing the current school office function is approximately £3.5m. The function employs approximately 350 staff equating to 230 full time equivalent posts.

7.1.2   As stated earlier, the Council has already agreed a corporate saving target for the school office function, of £350k in the current financial year.

7.1.3   This target will not be achieved in the current financial year, as the project has sought to undertake the extensive engagement referred to earlier in this report, and pursue a trial approach before implementing change on a wider basis. There is a substantial piece of work to put in place the required resources to support the trial also. The time taken to reach this stage of the project has been invaluable in getting feedback from stakeholders and shaping the current direction of the project. A trial approach will also be essential to allow the themes set out within the report to be extensively tested and reviewed.

7.1.4   While deferral of the saving provides the necessary space for the trial period to take place, consideration will have to be given as to how the saving target of £350k is addressed in the interim.

7.1.5   To implement the trial, the appropriate management tools and procedures will need to be in place first to create capacity and better working environments. There will therefore be costs in particular in creating the team leader role which will replace the existing Administrative Assistant role, as well as some potential costs associated with ICT/telephony and the general office environment. These are expected to be under £10,000.

7.2   **Legal** – commitment to compliance with relevant statutory requirements

7.3   **Equalities** – commitment to comply with relevant policies and statutory requirements

7.4   **Climate change/carbon clever** – may be increased travel as a result of team leader visiting participating schools during trial period

7.5   **Risk Implications** – there are a number of potential risks identified in the project's Risk Register and similarly a risk register for the trial has been established. The risk register is regularly reviewed and mitigating actions identified in relation to risks to the project.

- The pace of change is not compatible with wider expectations during a period of relative financial austerity
- The new management arrangement proves difficult to implement in practice and there is resistance to transformational change

- The level of technological transformation required is not realised
- The Head Teachers capacity to work with this project may be insufficient in light of the numerous and simultaneous initiatives that school management must contend with now and in the foreseeable future.

7.6 **Gaelic medium –** the project objectives are to provide optimum support for the delivery of learning teaching, irrespective of the medium the curriculum is delivered.

7.7 **Rural –** ensuring that the school office function is placed on a sustainable basis in rural schools where they exist. This project recognises the need and value of office staff presence in schools. The initiatives described provide further opportunities for skills development and enhancement and career opportunities in Highlands. In future enhanced services could be delivered rurally through schools.

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8. Recommendation

8.1 Members are asked to;

- Note progress achieved to date;
- Agree the implementation of a project trial as outlined in section 4 above;
- Note the extensive engagement already undertaken and further planned engagement with stakeholders during the trial period, the outcomes of which will be reported periodically to this Committee.

Designation: Director of Education, Culture and Sport

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Appendix 1 - Project Initiation

Extract from February report highlighting themes from that phase of work.

3.0 Emerging themes

3.1 The following themes have emerged as a result of the above work;

- School office employees have a deep sense of loyalty to their school.
- The school office is the primary port of call within the school and is therefore a busy place with a large number of unplanned interruptions.
- School office staff perform an essential role as the consistent link between the outside world and life within the school.
- Whilst a single school is in many ways unique there are consistencies around the tasks that are carried out and the issues and frustrations that are faced.
- How tasks are completed and ways of working can be variable across schools.
- There are a number of tasks that are frustrating and time consuming for staff due to outmoded processes, systems and interfaces with corporate and school office functions that lead to errors and additional effort for all stakeholders in order to resolve.
- There is in general a lack of appropriate ICT within school offices which could be used to enhance productivity and service within schools. For example security systems, telephony and mobile ICT capability.
- There is some variability in the breadth and level of responsibility at which office staff operate.

3.2 The identification and structuring of school office tasks and related corporate initiatives identified the following work-streams;

- **SEEMiS** – all office tasks that it is envisaged will be deliverable via the SEEMiS system when it is implemented were identified. As a result the opportunity exists to fully use SEEMiS to manage information and reporting from a single source in consistent way;

- **Managing interruptions** – this work-stream will examine how best to use Information and Communications Technology (ICT) to manage unplanned interruptions. Such interruptions are disruptive and add a disproportionate time to office staff's workload;

- **Financial** – these activities include School Fund management, purchasing and banking;

- **Management support and information** – these relate to the management support given to Head Teachers and Teachers. They also include organising parents evenings, emergency protocols, supporting management meetings, handling mail and email;

- **Pastoral care** – this relates to care of pupils, for example when they are in the medical room or are awaiting collection by parents/guardians;

- **Facilities management** – office staff are often involved in managing

issues around the building such as requesting janitorial assistance and managing school lets. Also, in some instances ensuring that building contractors were in possession of the appropriate documentation before entering the building to undertake work;

- **HR and ResourceLink** – some office staff assist in managing supply cover and absence/attendance records.

- **Job content and staffing structures** – the aim of this area of work will be to introduce consistency across schools on issues of induction, training, career progression and job descriptions.