

Improvement/outcome required	How Are We Going to do it?	Who	By When	Current Status
2.1.3 - Processes supporting the provision of Music Tuition should be formalised in written procedures.	Procedures to be written and implemented for recommendations in 2.1.3 to include: <ul style="list-style-type: none"> • operation of the waiting list; • archiving and destruction of personal information; • frequency of checks on entitlement to concessions; • application of concessions part way through a term; • filing system for new start forms; • unpaid debt follow up process (managed by the Service); • when a debtors invoice should be raised to recover unpaid debts; • recording of deferred payments; • budget monitoring; • inventory checks; • completion of the spreadsheet of current pupils receiving tuition (Pupil Spreadsheet); and • a legend for the Pupil spreadsheet for completing details and for colour coding. 	Acting music Co-ordinator	October 2019	With the exception of the inventory check all complete by June 2019. Inventory check on track to be completed by October 2019.
2.1.3 - Operation of the waiting list	Request to receive lessons to include: <ul style="list-style-type: none"> • Applicants seeking instrumental tuition in an Aberdeen City School registers interest via the ACC website - https://www.aberdeencity.gov.uk/services/education-and-childcare/school-life/music-tuition • To register interest for instrumental tuition, the applicant clicks on the 'Register For Music Tuition' link (which takes them to a Firmstep application process). They first read a GDPR statement and Private Policy before beginning the process to register interest. • Once their form is complete, a case is automatically created (in Firmstep back office) for the Music Coordinator to review the waiting list for availability. • If a space for instrumental tuition is NOT available: The Music Coordinator adds them to the waiting list where they remain until a space becomes available. • If a space for instrumental tuition IS available: The Music Coordinator starts the onboarding process. 	Acting music Co-ordinator	October 2019	Completed in full by June 2019

	<p>Onboarding actions put in place:</p> <ul style="list-style-type: none">• An email and link to the onboarding form is sent to the applicant offering instrumental tuition.• The applicant completes the onboarding form; if they choose to hire a musical instrument at this time, they read the Terms and Conditions of instrumental loan and complete the declaration.• Once the onboarding form is complete, they are redirected to the Civica Payment Portal to make payment.• If their payment is NOT accepted, they are redirected back to the Civica Payment Portal.• If their payment IS accepted, a case is automatically created in the Firmstep back office and an email alert is sent to the Music Coordinator.• The Music Coordinator allocates the case to himself and reviews the submission. If it is not complete and correct an email is sent to the applicant asking them to log back in an update with the additional information required.• Once it is complete and correct an email is sent to the relevant instructor informing them that tuition can begin.• The instrumental instructor prepares a lesson timetable and instrument loan, if applicable.• To communicate details of the first lesson, the instructor sends details to the Music Coordinator, who enters it into Firmstep to populate an email then sent to the applicant.• The pupil now has their first lesson. If their instrument is on loan from the Council, the instructor records and shares the instrument ID with the Coordinator.• The coordinator now closes the case. <p>Cessation of lessons:</p> <ul style="list-style-type: none">• Information on how to cease lessons is provided on the website. Lessons can only be stopped at the end of a term. We ask that at least TWO WEEKS notice is given before the end of term. To stop receiving music lessons, the parent / carer of the student enrolled with the Music Service should complete the online cessation of lessons form which is available on Aberdeen City Council's website. If lessons are cancelled after payment for lessons has been made, the			
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	<p>lessons will continue for the remainder of the term and terminate the following term.</p> <ul style="list-style-type: none"> • To cease lessons, the applicant will click on 'Music tuition – Cessation Of Lessons'. This will open a GDPR statement and Private Policy to be read before proceeding to the cessation form (in Firmstep). • Once complete, a case is opened in the Firmstep back office for the Music coordinator to review and assign to the relevant Instructor. • The applicant's lessons continue for the remainder of that term then cease. The Instructor removes the pupil from his register. 			
2.1.3 - Archiving and destruction of personal information	<p>Online Data</p> <ul style="list-style-type: none"> • Firmstep has been set to delete data (cases and personal information) in accordance with the policy statement on the website. <p>Paper/Hard copy Data</p> <ul style="list-style-type: none"> • All necessary paperwork is sent by instructors through internal mail to the music office where it is shredded after being scanned and saved to the network drive. <p>Scanned Data</p> <ul style="list-style-type: none"> • Scanned records will be archived for five years after a pupil ceases tuition (in accordance with the suggested retention period set out by the Scottish Council on Archive Record Retention of seven years). • After five years those archives will be permanently deleted. • A folder (Leavers) has been created in the O Drive and will be updated on a termly basis. Records will be kept for a maximum of five years and then the folder will be deleted (see attached Recommendation 2.3.2). 	Acting music Co-ordinator	October 2019	Completed by June 2019
2.1.3 - Frequency of checks on entitlement to concessions	<p>Currently checks on pupils entitled to concessions (for free school meals) are carried out by verifying through Seemis, at the start of each school term.</p> <p>With online payment, parents will be required to declare with each termly renewal payment for tuition, their entitlement to free school meals concession.</p>	Acting music Co-ordinator	October 2019	Completed by June 2019

2.1.3 - Application of concessions part way through a term	Concessions are now applied at the start of the following term through the new up-front payment system. Parents indicate entitlement on the renewal form although, following from above, the target future state is system integration that would make this automatic.	Acting music Co-ordinator	October 2019	Completed by June 2019
2.1.3 - Filing system for new start forms	This is now the Firmstep Customer Experience Platform; from this point forwards paper is obsolete for applications. (Assisted Digital pathways exist for those most in need.)	Acting music Co-ordinator	October 2019	Completed by June 2019
2.1.3 - Unpaid debt follow-up process (managed by the Service)	Since 2019 the Music Service emails all pupils, at the start of each term, a payment reminder for outstanding debt (there are no reliable records for outstanding debt before 2017). If a pupil with outstanding debt remaining ceases lessons, the music office phones to notify the parent of this.	Acting music Co-ordinator	October 2019	Completed by June 2019
2.1.3 - When a debtor's invoice should be raised to recover unpaid debts	All outstanding debt for lessons is reviewed at the start of each school term and before payment reminders are emailed to parents. At this time, and at the Music co-ordinator's discretion, a debtor's invoice may be raised.	Acting music Co-ordinator	October 2019	Completed by June 2019
2.1.3 - Recording of deferred payments	Deferred payments no longer occur--as at the current date the process is now 100% electronic up-front payment.	Acting music Co-ordinator	October 2019	Completed by June 2019
2.1.3 - Budget monitoring	The Music Service Co-ordinator meets with Accounting (currently Colleen Forbes, Assistant Accountant) once per quarter to review monitoring statements to identify variances (over/underspends), amendments to the forecasts and any areas for investigation. A minute is produced to record the meeting and sent to both the budget manager and service manager. Additionally, once each month Accounting reviews expenditure and YMI staffing costs.	Acting music Co-ordinator	October 2019	Completed by June 2019

<p>2.3.2 - An archiving process should be established which facilitates the destruction of records in accordance with the privacy notice.</p>	<p>An archiving process to be established across a number of systems (both digital and paper)</p> <p>Online Data Firmstep will be set to delete data (cases and personal information) in accordance with the policy statement on the website.</p> <p>Paper/Hard copy Data All necessary paperwork is sent by instructors through internal mail to the music office where it is shredded after being scanned and saved to the network drive.</p> <p>Scanned Data Scanned records will be archived for five years after a pupil ceases tuition (in accordance with the suggested retention period set out by the Scottish Council on Archive Record Retention of seven years). After five years those archives will be permanently deleted.</p> <p>A folder (Leavers) has been created in the O Drive and will be updated on a termly basis. Records will be kept for a maximum of five years and then the folder will be deleted.</p>	<p>Acting music Co-ordinator</p>	<p>August 2019</p>	<p>Completed- July 2019.</p>
<p>2.3.3 - The Service should make use of a unique identifier to enable the correct processing of information within music tuition.</p>	<p>Date of Birth is now required as part of the online registration process.</p>	<p>Acting music Co-ordinator</p>	<p>August 2019</p>	<p>Completed July 2019.</p>
<p>2.3.5 - The spreadsheet should be updated and reviewed to confirm completeness / accuracy.</p>	<p>A key has been created to ensure a consistent approach to recording information by using a pre-set index/legend or colours:</p>	<p>Acting music Co-ordinator</p>	<p>December 2019</p>	<p>Completed July 2019.</p>
<p>2.5.4 - If the spreadsheet is to remain the management tool for payment requests /</p>	<p>Points b,c,d, and e are superseded by the online payment system.</p> <p>A – email reminders for next term payment are manually sent by the music office two weeks before the start off the new term. In the future these emails will be automated.</p>	<p>Acting music Co-ordinator</p>	<p>October 2019</p>	<p>Completed July 2019. Automated payment reminders schedules</p>

recovery, then the following changes should be implemented:				to be automated between January and June 2020.
2.6.3 - Recommendation A termly reconciliation between the cash receipting system and the pupil spreadsheet should be carried out and any differences timeously investigated and corrected.	Service response is implemented.	Acting music Co-ordinator	October 2019	Completed July 2019.
2.7.8 - The Service should review the eligibility to concessionary entitlement prior to each termly payment request being issued and ensure the eligibility is fully supported.	Service response is implemented. Free school meals / Clothing Grants – parents register entitlement for this when they pay tuition fees online. The music office then eligibility with Seemis (FSM) and Revenues and Benefits (CG).	Acting music Co-ordinator	August 2019	Completed July 2019.
2.8.3 - The Function should confirm what the Policy is regarding non-payment of tuition fees and how this will affect provision of tuition, and thereafter apply it is practice.	Reminders of non-payment of tuition fees are sent twice per school term (in the middle and at the end).	Acting music Co-ordinator	August 2019	Completed July 2019.
2.8.4 - The pupil spreadsheet should be updated to capture the outstanding debt balance for each pupil / parent.	Service response is implemented.	Acting music Co-ordinator	October 2019	Completed July 2019.

2.8.5 - The Service should follow Financial Regulations regarding the write off of unpaid debts.	Service response is implemented.	Acting music Co-ordinator	August 2020	Completed July 2019.
2.9.4 - The procedures should detail how to authorise a refund and how a deferral is to be calculated.	<p>Currently, all refunds to credit cards require approval of the Co-ordinator, which is saved to the network drive.</p> <p>Following the introduction of online payment, there will be a no refund policy.</p>	Acting music Co-ordinator	August 2020	Completed- July 2019.
2.10.5 - A full check of the inventory should be undertaken, by removing every item from the store and then checking each back in, ensuring that empty cases are shown as such; instruments without stock codes are identified and recoded; and items awaiting repair are included. The Service should obtain replacement costs for all items on their inventories to ensure that insurance cover is adequate.	<p>This will be done in three phases:</p> <ol style="list-style-type: none"> 1. instruments currently in store 2. instruments being stored in schools 3. instruments on loan to pupils 	Acting music Co-ordinator	August 2021	Beginning at INSET 20 th August.
2.10.6 - The Service should require parents to resign the terms and conditions as part of the instrument hire payment process.	Superseded by online system.	Acting music Co-ordinator	October 2019	Completed July 2019.

<p>2.10.7 - The Service should introduce a process whereby the transfer of instruments between staff and pupils is fully documented.</p>	<p>The Service will email notification to parents that their child has received a Council musical instrument.</p> <p>Receipts will then be scanned and saved to the network drive.</p> <p>When returning instruments back to store instructors will complete and email a receipt form to the office (attached – RETURN OF INSTRUMENT form).</p> <p>The office will then email a copy of the form to the parents to confirm receipt of instrument.</p>	<p>Acting music Co-ordinator</p>	<p>December 2019</p>	<p>Completed July 2019.</p>
<p>2.10.8 - The system in place for managing the new annual hire charges should address all the weaknesses of the current tuition fees payment system.</p>	<p>Superseded by online system.</p>	<p>Acting music Co-ordinator</p>	<p>October 2019</p>	<p>Completed July 2019.</p>