

## **Eastern Cape Department of Education (ECDOE) Guidelines for the Management of LTSM (July 2018)**

### **1. Introduction**

Research has shown the important role that LTSM plays in improving learning outcomes. The ECDOE is therefore committed to the provision of textbooks and other essential LTSM to all learners to optimise learning. A key factor in achieving this goal is an effective LTSM management system at provincial, district and school level to effectively manage the annual procurement, use and retrieval of LTSM.

These guidelines provide direction to schools, districts and the ECDOE on how to develop and implement an effective LTSM Management and Retention Plan. The guidelines also outline responsibilities at each level in the system.

### **2. Roles and Responsibilities**

#### **2.1 Responsibilities: Schools**

Schools are central to the effective management of LTSM. Schools should therefore:

- ✓ appoint a School LTSM Committee to be responsible for the LTSM Management and Retention Plan;
- ✓ develop and implement a LTSM Management and Retention Plan that contains all the measures necessary for effective management of LTSM including the disposal of damaged or obsolete LTSM;
- ✓ develop an enabling environment that encourages and supports the care and control of all LTSM by learners, teachers and parents/care-givers;
- ✓ develop and implement an effective LTSM ordering system;

- ✓ develop and maintain an inventory system for all school LTSM;
- ✓ involve the School Governing Body (SGB) and the school community in managing and retaining LTSM through an advocacy campaign;
- ✓ conduct an annual audit of LTSM and take stock of LTSM at the end of the year;
- ✓ develop and submit an annual report on LTSM management to the SGB and the district office.

## **2.2 Responsibilities: Districts**

Districts are responsible for supporting, monitoring and reporting on LTSM in schools in the district. The District LTSM Committee is expected to:

- ✓ hold workshops for School Management Teams on managing LTSM resources and retention;
- ✓ support and monitor schools through periodic visits, audits and written reports to ensure that schools: develop and implement a LTSM Management and Retention Plan; develop and maintain a LTSM inventory; conduct an annual LTSM audit; and report annually to the province;
- ✓ develop and implement a focussed support plan for schools having challenges with LTSM retention;
- ✓ manage the transfer of surplus LTSM from a school having excess to another, needy school;
- ✓ compile a report for the province and DBE on LTSM retention in schools in the district with plans for improving retention in the following year.

## **3. Processes**

### **3.1 The formation of a School LTSM Committee**

A **School LTSM Committee** should be formed in each school to develop and implement the LTSM Management and Retention Plan in a school. Committee members may include subject or phase specialists, teacher-librarian/library assistant, members of the School Governing Body and a member of the school's senior management. All members must sign a Declaration of Interests Form to ensure that:

- ✓ there is confidentiality about the details of all orders and requisitions;

- ✓ all providers and potential providers are treated equitably and without prejudice; and
- ✓ each member makes known details of any private or business interest which she/he, or any close family member, partner or associate may have in any proposed procurement or disposal process, or in any award or contract, and that she/he will immediately withdraw from participating in any manner whatsoever should this be the case.

The LTSM Committee chooses core and supplementary LTSM in line with guidance from subject specialists and curriculum advisers. Schools are required to use their full LTSM allocation to purchase LTSM and must follow all approved departmental guidelines and procedures when procuring LTSM.

### **3.2 LTSM Management and Retention Plan**

All schools must develop and implement a **LTSM Management and Retention Plan**. This plan must take cognisance of the requirements set out by the ECDOE when purchasing LTSM from service providers. The ECDOE regards the lifespan of a book to be a minimum of four years.

The school's LTSM Management and Retention Plan should include the strategies the school will use to encourage all in the school community to (a) take care of the LTSM used and (b) ensure the safe keeping of such LTSM.

These strategies can include:

- ✓ Lessons or projects on how to care for LTSM and ensure their safekeeping;
- ✓ Promoting a culture within the school of respect for all LTSM. This could include a list of Do's and Don'ts in caring for LTSM, the displaying of posters with suitable messages and the modelling of appropriate behaviour by teachers;
- ✓ Workshops for the care of LTSM;
- ✓ Involving the School Governing Body (SGB) and the school community through an advocacy campaign including communication to parents via circulars or at parents' meetings;
- ✓ Measures to ensure effective control of the issuing of textbooks and library resources at the beginning of a year and the returning of textbooks at the end of

the year. This must also include (a) controlling issuing and returning of textbooks during the course of the year to learners who enter or leave the school during the course of a year and (b) controlling issuing and returning of teacher's guides and learner textbooks.

### **3.2.1 The development and maintenance of a LTSM inventory**

The School LTSM Committee should develop and maintain a LTSM inventory of all the school's LTSM. The inventory must be a written record of the number of LTSM per grade as Stock in Hand. Thereafter, when LTSM is delivered to the school, the types, quantities and invoice numbers of LTSM must be entered into the LTSM inventory.

The school must conduct an inventory check by holding a LTSM check at least once per term to check for missing and damaged LTSM.

The school principal must ensure that an audit or stocktake of all textbooks and library resources is undertaken at least once per year. After the audit, the inventory must be updated to reflect books lost, books replaced, books purchased, books written off as damaged or obsolete and stock on hand by 30 November of each year. The inventory should be used to inform shortages for the following year 'top up' orders and the annual report on textbook retention that is submitted to the SGB and districts.

After the completion of the textbook stocktake, the LTSM Committee must report to the principal on the number of books issued and the number returned for each title. The overall percentage of books returned must be calculated. The report must conclude with recommendations on how to raise the percentage of books returned in the following year.

The School LTSM Committee must enter all damaged and obsolete items in a disposal register as well as in the LTSM Inventory. Once authorised by a designated authority, the disposal process can be followed.

In the case of missing books, parents must be informed and asked to replace them or pay their replacement value to the School Principal.

### **3.2.2 Requisitioning, ordering and receiving LTSM**

Each school must complete a **requisition form** for the ordering of Core LTSM. The requisition form must indicate the estimated number of classes and learners per grade, language and subject for the following year and the required quantities. Completed requisition forms should be delivered to the District, in electronic or print form. Requisition forms must be signed by the principal and the chairperson of the School LTSM Committee certifying that the information submitted is correct. The data submitted will be collated by the District and Province and used for the centralized procurement process. The consolidated orders will be placed with suppliers.

The ECDOE will manage the distribution of LTSM to schools. In line with audit requirements, the principal must inform the provincial education department of the names and signatures of the officials at the school, who are authorized to receive and certify Proof of Deliveries (PODs) of LTSM delivered to the school.

Before the PODs are certified as correct, the items delivered must be checked against the items listed on the requisition form to ensure that only items that were ordered are delivered. One of the official signatories who has the authority to receive LTSM, must check, sign and file a copy of the POD. LTSM suppliers must deliver the orders within the specified period and according to the official order.

### **3.2.3 Recording of LTSM**

When LTSM is delivered to the school, titles and quantities must be entered into the school's LTSM inventory. All books must be stamped with a school stamp in three places, on the cover page and on the last page.

All LTSM must be kept safely whilst not in use. The Department of Basic Education and ECDOE have the right to visit schools at random to check if supplies have been delivered according to specification and that they are recorded, safely stored and effectively utilised.

### **3.2.4 Issuing of LTSM to teachers and learners**

At the beginning of the school year, teachers and learners must sign for each book issued to them on a list against each book's number.

#### **RECOMMENDATION**

It is recommended that the Head of Department approves the attached ECDOE Guidelines on the Management of LTSM and the Template for a School Policy on the Management and Retention of LTSM.

Learners sign for each book issued to them on a list against each book's unique number. Each learner should have a booklist that must be signed by the learner and/or parent/guardian. A parent/guardian could sign an undertaking to replace lost or damaged books. Signed booklists should be kept in the school's safe room by the LTSM committee.

When textbooks are distributed to learners, the following should be recorded in the school's textbook inventory:

At the end of the school year, books must be handed in to the subject/class teacher on a specified day. The teacher must check each book against the book's number and the learner's name. Alternatively, the textbook committee could collect textbooks that learners return to the book room, using the booklists. When books are returned by learners they should be kept in a safe, secure storage facility.

### **3.2.5 Reporting**

After the completion of the textbooks and library resources stock take, the LTSM Committee must report to the principal on the number of books issued and the number returned for each title. The overall percentage of books returned is calculated. The report must conclude with recommendations on how to raise the percentage of books returned in the following year.

The principal must then report to the District on the LTSM retention for the current academic year, citing reasons for loss or damage.

### **3.2.6 Monitoring**

The District/Circuit Official will be responsible for ensuring that schools establish a LTSM Management Plan and implement it effectively. In addition, they must undertake periodical checks on furniture to ensure effective use and safekeeping. The provincial furniture official must be responsible for confirming that effective monitoring of furniture management and annual stock-taking is done at school level. Districts must also manage the transfer of surplus furniture from a school having excess to another, needy school.

The District submits a report to the ECDOE on furniture stock at each school in the district at the end of the year.