



Document Control

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Sunbeam House Services Policy Document	Title: Resource Management Policy
	Effective Date: 28th April 2015



1.0 POLICY:

Sunbeam House Services (SHS) resource management policy is written with regard to setting out the best practice in dealing with company's financial resources.

2.0 SCOPE:

This Policy applies to all staff employed by Sunbeam House Services , Its Board and Agents.

3.0 ROLES & RESPONSIBILITIES:

All staff working in SHS are responsible for complying with this policy. It is the responsibility of the Senior Management Team to ensure that this policy is enforced.

4.0 General Purpose:

To ensure that all financial resources are used to the maximum benefit of the clients.

5.0 Introduction:

This policy is to outline how SHS decides to use the financial resources it has received in the provision of a range of support services to clients in different locations.

The organisation is moving towards an individualised budget process for each client but in the meantime operates services in different locations managed by a number of Client Service Managers (CSMs).

6:0 Background:

SHS receives the bulk of its resources from the HSE in the form of a block grant each year. Since about 2005 new service developments have been individually costed and funded but before that clients have been funded on a "block" basis making it very difficult to unbundle monies on an individual basis.

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7.0 Resource Management Process:

In October of each year SHS start the process by asking the CSMs to present a detailed and costed budget proposal for each of their locations for the forthcoming year to the General Manager (GM). This should take into consideration the staffing and resource requirements to enable the appropriate support for the clients in each location. The CSMs will discuss this with their staff and clients as to what is required given the limited resources.

Based on the government budget announcement regarding the forthcoming year and changing service/support requirements in SHS, the GM will inform CSMs of any financial adjustments and then the CSMs will make appropriate adjustments to their draft budget for each location. The relevant budget will be distributed to the GM and the Senior Management Team (SMT) for consideration. All budgets must at least break-even within the income that is allocated for them from the HSE.

CSMs in relevant areas should work together to work out where budgets may be shared or where resources can be pooled to make a more efficient service provision.

In Nov/Dec the GM will collate all returns into a master organisational budget for all areas. There may be a need to make some adjustments to the draft budgets which will then be re-circulated again for discussion and consideration. The CSMs and the SMT will need to sign off on these budgets for presentation to the Board of Directors by mid-December. If appropriate the Board will then pass the budget for the relevant year.

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