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To: G&A Trading Activities Sub Group - 4 July 2012

Subject: Appendix 1 – EduKent Progress Report

Classification: Unrestricted

Summary: This appendix provides an update on the progress made by the EduKent team since October 2011.

INTRODUCTION

1. This report updates Members on the work of the EduKent Team since October 2011 when the last update was presented.

DELEGATION

2. This was a separate work stream within its own right in the ELS 100 Day Plan but clearly overlapped with the EduKent work. Following the delegation decisions by Cabinet in October 2011, EduKent supported the service providers that are now trading with schools.
3. Over 500 schools have now been issued a summary of the 'packaged' delegated services they have ordered. 'Ad hoc' services will continue to be purchased throughout the year.
4. The EduKent team is continuing to work with service providers to ensure they are aware of the details of the services they will be delivering, and correct billing information is processed.

CONTACT KENT

5. EduKent relies on the continued support from Contact Kent. The advisors are briefed regularly on all new initiatives to ensure our customers receive the best possible service from point of contact when phoning our generic number. During January, when schools were focusing on ordering services that were delegated to them, there was a large volume of calls, up to 70 – 80 incoming calls a day. In the future EduKent may use Contact Kent to support any marketing initiatives.

JOINT WORKING WITH COMMERCIAL SERVICES

6. EduKent started to develop links with Commercial Services back in October 2011, and the relationship is in its early stages of development. An early joint focus area will be to assess the readiness of the individual EduKent services to respond quickly to enquiries and deliver beyond Kent.

COMMUNICATIONS

7. To raise the general profile, improve accessibility and increase website traffic, an overhaul of the EduKent website is now underway. Following a tendering process, a creative agency has been appointed with the remit to launch an updated website (incorporating the outcome of a review of the EduKent brand and visual identity, to make it stronger) and comprehensive brochure at the EduKent Expo and Conference (formerly the Schools' Financial Services Conference and Trade Fair), scheduled for 27th September 2012.
8. At every opportunity EduKent is represented at Head teacher, Governor and Bursar meetings. Generally, these meetings have been well attended and have been complemented with telephone and e-mail contact directly with individual schools where the need has been identified either by the EduKent team, service provider or the school. In addition, an EduKent working group has been set up with the Kent Association of Head teachers (KAHT) to help shape delivery requirements for future service.
9. An EduKent website (intranet) is also being developed with ICT to improve communication links between EduKent and the service providers.

CONFERENCES AND EVENTS

10. As part of the EduKent plan, an events register has been developed to ensure the opportunity of existing conferences and events relevant to EduKent's target audience is taken advantage of fully, in partnership with all service providers.
11. In addition to this, EduKent secured a stand at the 'Academies' Show' at London's Olympia recently. With in excess of 2,000 leading decision makers in attendance from across education looking to buy services it was an ideal opportunity to showcase EduKent to a targeted audience and develop relationships beyond the borders of Kent. On the day, there were more than 130 expressions of interest and the leads are now being followed up.
12. EduKent will also attend all conferences, events and briefings run by the individual services such as the EIS Exhibition and Conference, 'IT12', on the 13th June 2012.

INTERNAL SUPPORT TO SERVICE PROVIDERS

13. To engender a more commercial/entrepreneurial mindset, EduKent is applying its new resources to guiding, supporting and even coaching those service providers new to trading who need to understand all the implications of this new way of working, for example:

- Delivering consistently to paying customers across Kent.
- The need to justify and document charges raised.
- Balancing resource (need vs. who is paying).
- Meeting generally raised expectations for a service when it's linked to a monetary transaction.
- The EduKent Business Liaison Officers will be visiting all service providers to ensure they know and understand their business sufficiently so wherever EduKent is represented at any event or in a school/academy, all service providers are marketed properly.
- In addition, service provider workshops will be arranged to help in the areas of billing, vat and marketing.

FINANCIAL AND MANAGEMENT INFORMATION

14. All of the service providers are now required to use the Contracted Schools Billing (CSB) system for all their charges to schools and academies. Over 550 Kent schools and academies have signed up to the Direct Debit process with only a small number still being chased. Although in an interim phase pending consolidation of packages and ad hoc charges due in September 2012, feedback from schools has been positive. Schools transferring to Academy status are being managed carefully to ensure a seamless process.
15. Enhanced security and facilities will also enable service providers to key in their own data in the future. The billing team has further streamlined processes by targeting Medway schools, other Local Authorities, and other educational establishments to include them within the Direct Debit process over the next 6 months.
16. From September this year the CSB system will be able to give accurate income figures for individual service providers in EduKent.
17. We are currently working with service providers and finance teams to capture appropriate expenditure relating to traded services for 2011-12. For some of the established service providers, this is straightforward; many, though, have not had to review their budgets in this way before.
18. The quality of information provided has been inconsistent which has highlighted the need for a more structured approach to recording trading information within the financial system. To ensure accuracy, the intention is to incorporate the collection of trading information within the existing corporate monitoring process with a link to the EduKent team to provide a position statement at certain times of the year.
19. Also, creating a structure within the ORACLE system will in future enable the EduKent team to access information at any time. As the current list of service providers spans several Directorates across the authority, consideration is also being given to how service providers should report this information. This information will help inform that full cost recovery is being achieved, and in time help inform the further development of pricing and marketing strategies.
20. The CSB system is also the source for management information on service providers' contract details and what each school purchases regularly and

details of past charges. Currently, there are more than 40 services that are charged to schools and academies in Kent and beyond on a monthly basis on the CSB system.

QUALITY ASSURANCE (QA)

21. EduKent aims to deliver a consistently high level of service and individual service providers are being canvassed to confirm their processes for assessing levels of satisfaction. Although there is no evidence whatsoever of low levels of satisfaction, currently formal processes for QA are inconsistent across services and localities. EduKent will seek, after October this year, to develop a single process or measure for QA, such as the Customer Service Excellence (CSE) accreditation, which will add value to the business for individual service providers and customers alike. In the meantime, however, EduKent will put in place formal means of surveying its customers (both schools and individual service providers) to check and improve upon its standing with them.

TERMS AND CONDITIONS

22. The work has been completed on a single set of terms and conditions for all EduKent services and is now available on the EduKent website.

INSURANCE

23. The review into indemnity cover has been finalised for all new service providers, ensuring appropriate cover was available before trading started in April 2012.

INTERNAL GOVERNANCE

24. An Internal Governance Group (IGG) has been in place since April 2011.

25. A Sales and Marketing Steering Committee has also been set up to operationally manage commercial issues with service providers.

EDUKENT STAFFING

26. As part of the finance re-structure, there is a substantive EduKent team with effect from 1st April 2012 consisting of KR13 EduKent Manager, 2 Principal Officers at KR11 and 1 Senior Officer at KR8. In addition, there is a Marketing Officer currently working with the team who is concentrating on sales and marketing developments.

Nick Jordan, EduKent Manager, June 2012