

CUMBRIAN SCHOOLS FORUM – CONTRACT MONITORING GROUP

Notes of the meeting of the Contract Monitoring Group held on Monday, 11th July 2005 at Capita Building, Kingmoor Park, Carlisle.

Present: Mr R Alston, (Foundation Secondary), Mr R Rogers (Eden Primary), Mr A Rutter (Teacher Associations), Ms A Daley (Beckermet School Finance Officer), Mr A Hodge (LEA), Mrs J Collins (LEA) Mr J Slee (Capita – Property Services), Mr A Blackett (Capita IT Services), and Ms P Cameron (Capita – Finance and HR Services).

Apologies: Mr P Studd (Capita – Contract Director), Ms P Sumner (Corporate Procurement), Mr K Little (CCC – Labour Group)

At a number of meetings of the Schools' Forum and the Schools' Budget Working Group concerns had been expressed about services provided to schools. The Contract Monitoring Group had been set up to oversee issues relating to all contracts and would meet with all Service Providers during the year. The purpose of this meeting was to consider the services provided by Capita.

1. Introduction and Purpose of the Group	Action
<p>The group stressed that they would be considering all contracts during the year. It had seemed appropriate to start with Capita, as they represented the largest contract. It was intended that the Contract Monitoring Group would form a constructive two-way communication channel for any issues or praise between schools and contract providers. It was a useful forum for the smaller schools to get their voices heard. If the two sides worked together then, overall, the service should be improved.</p>	
<p>2. Capita Services Presentation A copy of the presentation given by Capita Services is attached. The presentation covered the three key areas of Property Services, HR Services and IT Services.</p>	
<p>3. Issues raised by Schools The group referred to comments which had been previously circulated. It was agreed to limit the discussion to trends and not specifics. Schools had fed back to the group that there had been substantial improvements in payroll and finance. A list of nominated contacts also produced by Capita had proved very useful.</p>	
<p>There were two main areas of concern.</p>	
<p><u>Building – Project Management</u></p>	
<ul style="list-style-type: none">Schools felt that the onus was on Capita to manage building projects and that this was not happening as it should be. A briefing guide to building work had already been issued but was obviously not in use. This would be reviewed and circulated to all schools. A tracking system to record building work commissioning was also being set up.	John Slee
<p>There was confusion about the scale of fees charged by Capita. Because projects could be very individual, Capita had not initially wished to commit to a pricing structure. Also other contractors could have used it to undercut the existing bid. It was agreed that in the interest of both sides fees and expectations should be signalled in advance – in writing. Capita would produce a statement of differentiated fees with an indication of what projects would fall into which fee bracket.</p>	John Slee
<ul style="list-style-type: none">The numbers and diverse sizes of the Cumbrian Schools could make	

project management difficult. This would be partially resolved by the improved communications above. In the future it was hoped that nominated building contractors would sit in on project meetings from the very start.

- Billing invoices needed to contain a breakdown of what services had actually been provided. It was accepted that there were sometimes delays with invoices (due to having to check final amounts with the contractor) but all agreed that this was unhelpful for schools who needed the information to manage their budgets.

John
Slee/Pauline
Cameron

SIMs Support

- Schools did not find the current helpdesk procedures to be particularly useful. Often school staff could only discuss the problem when they actually rang – not when a systems analyst was able to return the call. Alan Blackett indicated that schools had been initially offered a system where the response was within half an hour, but that this had been rejected as being too expensive.
- The Group questioned the level of customer satisfaction that Capita had quoted during their presentation.
- Many schools were dissatisfied with the SIMs product itself – feeling that it could do less and less and that there were ‘constant’ upgrades. Capita are not responsible for the design of the software. Schools had been canvassed to ascertain which reports were useful to them and there were over 50 of them on the website. Guides for some unstatutory reports (i.e. KS1 printouts) were now also on the net.
- There were 5 systems approved by the DfES. The Group asked whether Capita had to recommend only 1 product – or if they could take on an independent advisory role – finding products suitable for a school’s individual circumstances. Alan Blackett agreed to look into this – but it would depend upon the views of the software houses. Anton Hodge would ask Shaun Smith for views on the current Education Service System.
- Communication – there were sometimes issues with schools finding things. Capita had its own website, but would ask to be able to send useful documents through the Schools Portal.

Alan Blackett
Anton
Hodge/Shawn
Smith

Alan Blackett

4. LEA Issues

- Capita contract was due to expire on 31/01/08. Any Capita contractors working on current projects would be protected by TUPE and could either transfer across, or the job would revert back to the County Council. Statutory guidelines would cover most of the payroll/personnel issues. Personnel records were the property of the LEA, but there may be a charge for the transfer of some information.
- Capita’s insistence that an employee must have different tax codes (when they had more than one employment with the Education Directorate) was resulting in some people being taxed too heavily. This stance also appeared to contravene advice from the Inland Revenue. Capita would send a full written explanation of their policy along with instructions for employees to prevent them being out of pocket.

Pauline
Cameron

5. Future Work

- Performance indicators would give schools a useful baseline against which to measure whether they should remain with a contractor or seek an alternative. Capita had already produced a Service Plan for 2005. Relevant Performance Indicators could be lifted from this (no more than 4 maximum for each service) and coupled with ones agreed by the Working Group.

Anton Hodge
– End July

- Capita would give individual responses to Schools whose comments formed the basis for this meeting and copy to Anton Hodge who would report back to the Group.
- Any future complaints about Capita services would be forwarded to the appropriate unit. They would respond directly to the school and copy to this group
- In the long term Capita had been asked to consider whether they could offer a more individual service to schools, e.g. with differentiation between small or large and primary or secondary. This was already being considered on a national level and the results will be fed back to the Working Group.
- As Capita was the largest Contractor a further meeting would be arranged later in the year.

Capita units
Anton
Hodge/Capita

6. Any Other Business

Not applicable.

7. Date and Time of Next Meeting

P&R/JC

14 July 2005