

Achievement

the SIMS in Education newsletter

Spring 2003

We are staying with SIMS!

SIMS

Tollbar chooses 'SIMS tried and tested' technology and its .net developments

The grass is not always greener as far as Management Information Systems are concerned! Tollbar chose 'SIMS tried and tested' technology and its .net developments. Tollbar Business and Enterprise College near Grimsby is one of the largest secondary schools in the country. A focus on 'Business' subjects (ICT, Maths and Business Studies) has been developed alongside the well-established ethos of hard work, good behaviour, examination success and consideration for others. Principal David Hampson and his staff promote the strong learning culture that is a feature of all successful schools, and are adding the 'best educational technology that money can buy to maintain the College at the leading edge of educational innovation'. After running CMIS Facility and SIMS side-by-side for two years, the College has chosen SIMS as its future provider and partner.

Vice Principal Chris Arthur explained:

- SIMS timetabling package NOVA T is absolutely reliable, with no major flaws. The Facility product was not flexible enough, as in the view of this experienced time-tabler, it is designed to autoschedule. This does not deal well with the critical 'individual last pieces in the jig-saw'

SIMS is secure – this is essential. When training on Facility a teaching colleague was able to quickly 'hack' into the pupil data and make changes.

- Staff using Facility were able to change the configuration, raising security problems for the network administrator; SIMS is easy to administer and is secure
- When administrative staff entered data in one part of the Facility system, this did not 'roll-through' to other areas without considerable technical assistance. Office staff find SIMS more user friendly for day-to-day office administration
- The supposed web functionality of Facility never came to fruition at Tollbar – yet the College has extremely high quality kit AND excellent technical support

After running CMIS Facility and SIMS side-by-side for two years, the College has chosen SIMS as its future provider and partner.

- As in all secondary schools, examinations administration is absolutely mission critical. The College has total confidence in its current tool, SIMS NOVA-E, and will move to SIMS Exams Organiser in due course

The new reporting functionality, especially in Assessment Manager 6, is of the high quality we demand. We plan to use Performance Analysis as a key tool in our target setting process.



Our partnership

With over 22,000 school users, we at SIMS already work with schools of all sizes and in all phases to use management information to reduce teacher workload AND to record, report and analyse pupils' performance. We are delighted to welcome Tollbar to our user-base. We look forward to working in partnership with them to continue the development of SIMS, to reflect the needs of a large, complex school with high technology capability.

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SIMS EMS

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SIMS and EMS



Key Stage 2 pupil data transfers to secondary schools electronically with SIMS and EMS: saving time AND providing pupil-level information for early planning!

Capita Education Services' Brian Hodge explains what schools and LEAs now have to do.

The DfES made it statutory in June 2002 for schools to produce an electronic Common Transfer File (CTF) for transfer between schools; however, it was accepted that it would take until June 2003 before all schools and authorities had set out clear strategies to achieve this minimum requirement. The DfES also offers a secure S2S (School to School) site for the transfer of these files between authorities and schools. It is envisaged that this service would mainly be used for 'casual transfers' during the year. The DfES expect that LEAs will manage the bulk transfer from primary to secondary phase (or first to middle and the upper schools where the transfer process includes middle schools) as an extension of their admissions and transfer process.

This will help these receiving schools build on the assessment tracking information provided by the primary schools to minimise pupil regression and maximise pupil progression in performance in years 7 and 8.

These case studies show examples where LEAs using EMS, in partnership with their schools using SIMS, are providing a much enhanced service for receiving schools.

Primary schools that use SIMS Data Manager and Assessment Manager to send core pupil and summative performance data to their LEA, enable the latter to provide secondary schools with accurate early information. This is well in excess of the CTF minimum requirements. On many occasions, pupils transfer to secondary schools in neighbouring LEAs. If adjoining LEAs collaborate, then enhanced assessment information can be shared with secondary schools in these LEAs where appropriate. Alternatively, the LEA can provide a neighbouring LEA's secondary schools with DfES CTF files.



Reading LEA's electronic transfer now includes question-level analysis!

We reported (see Achievement 5 October 2001) how Reading's secondary schools received their intakes' Key Stage 2 Teacher Assessment and SATs results electronically by mid July, for the first time in 2001. Each primary school sends a results file to the LEA via SIMS Assessment Manager. The LEA then collates the results using EMS PULSE, and electronically forwards a single assessment file to each secondary school, using EMS Admissions and Transfers.

In 2002, the LEA team added question-level analysis for Maths, to the information received electronically by the secondaries. This pilot has proved very popular; secondary schools' Maths departments are able to plan their learning programmes for Key Stage 3 Maths earlier and more effectively, and primary schools receive feedback relating to areas of strengths and weaknesses of their Maths curriculum. Other curriculum areas may be added to this service next year.

EWOs and LEA Advisers recognise the benefits of this electronic transfer, and will be also receive information electronically in future.

The key beneficiaries however will remain the schools. For primaries, the production of ONE export file of Key Stage 2 data for all pupils, reduces teacher workload greatly. For secondaries, the early availability of the data makes it possible for teachers to plan organisation and curriculum programmes before the start of the Autumn term. Schools have been so pleased with this service that the team might be asked to include more information in future, consolidating their key role as a data warehouse for schools!

(with thanks to Dianne Coleman-Rouse, Reading LEA)

Surrey LEA transfers 10,000 pupil records electronically, from primary to secondary schools

In 2002 Surrey LEA successfully transferred about 10,000 pupil records electronically to secondary schools, before the start of the Autumn term. In the Summer of 2002 the LEA had taken part in the QCA's pilot for the submission of electronic Teacher Assessments (TAs) for both Key Stage 2 and 3. 128 primary schools took part in the pilot that collected TAs for core subjects, through the use of SIMS Key Stage Manager. 51 secondary schools submitted electronic data for KS3 TAs for both core and non-core subjects. For all pilot schools an immediate benefit was that there was no need for teachers to complete large numbers of OMR sheets!

Most KS 2 schools submitted data early in May, enabling the LEA to transfer the KS 2 TAs to secondary schools by end of May but also utilising the data for the QCA pilot project. The EMS Admissions and Transfers module was used to identify which secondary schools were to receive data on which pupils.

For all pilot schools an immediate benefit was that there was no need for teachers to complete large numbers of OMR sheets!



The import into the school system was very smooth and saved a great deal of time.

When the QCA disc containing KS2 results arrived in August, the LEA again utilised the EMS Admission and Transfers module to send the KS2 test results to secondary schools. Primary schools had carried out school-to-school transfer in July. However, the LEA wanted to research options to alleviate the pressure placed on these schools at the end of term, arising from the manual entry of test results in order to pass data onto the secondaries.

All secondary schools received an Excel® file containing Teacher Assessments and Test Results, which they were then able to import into SIMS Assessment Manager. These files were in schools before the start of term in September.

The LEA continued the work and imported all results into EMS PULSE, with only 6 errors on UPNs out of about 10,000 records. An '.mtf' file for one secondary school was produced and when imported directly into the school system only a small number of mismatches occurred. The import into the school system was very smooth and saved a great deal of time.

Surrey's work with schools to determine the best way to transfer performance data in July between schools, is ongoing. Electronic test results from the QCA would greatly enhance the process and remove the pressure that is placed on primary schools during the last couple of weeks of the summer term!

(with thanks to Claire Titchener, Surrey LEA)

Commercial Partner Kalamazoo



Cash Me If You Can: SIMS and Partner Kalamazoo work together to prevent fraud!

Fraud is something all organisations have heard about, but many believe they will never experience.

The sad fact is, your school could become a victim if you do not protect your payments as losses are rarely recovered.

Cheque fraud is a well-known example. Many cheques are reproduced, and whilst most of them are spotted before they are cashed, those that slip through the net have a devastating impact on the organisation that issued the payment.

Over £1 billion per annum is lost to fraud. Total monetary fraud accounts for more than 70% of this, and almost 25% of monetary fraud is directly attributable to cheque fraud. In addition, only one in five organisations recover more than half of their losses. These statistics demonstrate how important it is for schools to protect themselves against this threat.



The recently released film 'Catch Me If You Can', starring Leonardo de Caprio, is based upon a real life former 'con man', Frank W Abagnale.

Abagnale cashed over \$2.5m in forged cheques between the ages of 16 and 21. He served time in prison in France, Sweden and the USA. However, he is now recognised as a leading authority on financial security and believes that prevention is the only way to combat fraud, as recovery of funds is so rare.

Many schools choose to make payments by computerised cheques because they are more time efficient than traditional hand written systems.

SIMS has therefore teamed up with Kalamazoo Security Print, who have designed a range of security cheques especially for SIMS users.

Kalamazoo Security Print has more than 50 years cheque printing experience. Kalamazoo provides a range of payment solutions which aim to increase the efficiency and security of an organisation's payment process.

The SIMS Security Cheque produced by Kalamazoo includes a hologram, watermarked paper and 'Copyvoid' feature to help protect against illegal reproduction. The product range caters for every size of school and LEA, and we provide a full support service to make the change from manual to computer based systems as easy as possible. So in response to the film, Kalamazoo has coined the phrase 'Cash Me If You Can' to emphasise the superior standards of their security cheques!

Kalamazoo Security Cheques are strongly recommended by SIMS at Capita Education Services.

Research based upon findings from PWC 2001 Crime Survey, APACS and BBA.

- APACS – Association for Payment Clearing Services www.apacs.org.uk.
- BBA – British Bankers Association – www.bba.org.uk.
- Frank W. Abagnale – For more information visit www.abagnale.com

About Kalamazoo

Kalamazoo is an established British company with over 50 years experience in cheque security and production. Kalamazoo was acquired in 1997 by Adare Printing Group Ltd. Kalamazoo specialises in financial transaction security, payroll solutions, ticketing and security products.

For more information, contact Kalamazoo on 029 20 40 4000.



Consistent Financial Reporting

SIMS Finance Product Manager Ian Romeo-Smith unravels the complexities of Consistent Financial Reporting.

The DfES introduced Consistent Financial Reporting (CFR) to all English maintained schools in April 2002. CFR requires a 'return' to be made to the LEA in the form of a XML file, the prescribed format. The LEA will collate the returns prior to forwarding a consolidated return to the DfES. The DfES intends CFR to be the standard financial report used by schools and governing bodies to manage their resources and for external bodies to review and benchmark schools.

CFR is the first financial statutory return in SIMS FMS6. Capita Education Services liaised closely with both DfES and a group of LEA finance officers before and during development. The CFR return was included in SIMS 6.50 in the Autumn 2002 in line with the DfES guidance. The 2002/03 CFR return is required to be submitted during the Summer Term 2003.

To assist the LEA in collecting financial data from schools, a report entitled "Income and Expenditure" was also included. This report can be produced from FMS and includes the CFR together with financial data not included in CFR such as balance sheet data. The resulting XML file can be stored and reviewed within the EMS SEQUEL module.



CFR with SIMS: Warwickshire trains 100 Schools in seven days!

Lesley McGovern, Deputy Manager of the Schools' Finance Team tells how:

"We recently completed CFR training for 100 schools using SIMS FMS6. The schools were trained over seven days at a rate of sixteen schools per day at our Manor Hall Training Centre in Leamington Spa.

The schools were split into categories, Primary, Secondary, Foundation and Special. We then split them further between County and Voluntary Aided.

For schools to get the most from this training we felt it was important for them to work on their own - relevant and meaningful - data, so we loaded their details onto our training PCs.

The training was extremely challenging because when schools are working on their own data, the problems are many and varied. Feedback about the program was very positive but schools quickly realised that accuracy and attention to detail is absolutely vital to produce a balanced CFR Report. In fact we wouldn't let schools leave the training course until they had balanced their CFR report, or knew what corrections were required when they got back to school!

"Overall the training went very well. The schools appreciated the time and effort we had spent in presenting a stimulating and challenging training course."

The functionality in SIMS FMS6 works really well and loads easily into the DfES software. We firmly believe that the time and effort given by both Warwickshire's Finance Schools Team and all the schools will pay dividends when CFR data wings its way down to the DfES in the summer".

How was it for the schools?



Lynda Pearce, Bursar at Manor Park Community School in Nuneaton is confident...

"I found that Consistent Financial Reporting workshop to be very helpful. The excellent course material and the work carried out beforehand by Warwickshire Education Services Finance made the process of mapping ledger codes and cost centres very straightforward.

The new index tab for CFR in General Ledger Setup was easy to work with; just a simple task to map my school's set up to CFR codes. The important thing to remember is to take time to decide the appropriate CFR codes to use.

The CFR reports were of high quality and helped to provide important information in balancing the final CFR figures to the system's fund review. This balancing proved to be the most difficult area to accomplish, but with the help of the WES Finance instructor, I was able to resolve the queries.

I feel the workshop has enabled me to clearly understand CFR reporting and has provided me with the information I need to ensure I am able to fulfil all requirements for the end of year CFR reports".

"The excellent course material and the work carried out beforehand by WES Finance made the process of mapping ledger codes and cost centres very straightforward."

And the Primaries also see the benefits...

"The Benchmarking information, rather than providing answers, makes us question more deeply the reasons why our expenditure appears on the graphs as it does.

Using the CFR report as a replacement for SO2 will be brilliant, having recently been involved in completing 3 SO2s in a twelve-month period I can certainly see the benefits"

Annette Lowe - Bursar, St Michaels C of E Primary School, Bedworth

"I think the governors will appreciate the format of the CFR, alongside the head teacher's report it provides comparative information with easily understandable income and expenditure categories"

Rosemary Bird - Head Teacher, St Michaels C of E Primary School, Bedworth



SIMS Dinner Money

Taking the strain in Sandwell's Primaries with SIMS Dinner Money: our editor Viv Nunn visits the West Midlands

Old Park Primary School

Old Park Primary is a large primary school, with over 400 pupils. The school has its own canteen, run by a private contractor. The children are asked to bring their dinner money in weekly, but as in most primaries in practice it arrives every day! The children whose parents are on income support receive free school meals, and a number bring a packed lunch. All pupils in school are supervised during the lunch break. Dawn Brannigan is responsible for collecting dinner money, and 'balancing the books'. Her colleague Kim Roberts takes over in the afternoons, ensuring that pupil and meal details are always up-to-date.

Dawn told me that although initially she had mixed feelings about using a computer programme to assist in this important task, she now would not be without the module.

I asked why she had been converted: she explained;

- It is easy and straightforward!
- Using Dinner Money is much quicker than manual registers
- We give the kitchen weekly dinner numbers – but the inevitable changes are easily made and passed on
- It is accurate – if there are discrepancies they are easily seen, so balancing is easy
- It deals with both advance and arrears payments
- It deals with staff meals
- It produces letters - eg to remind parents of free school meal expiry dates, and dinner money 'reminders'
- It produces class or individual summary sheets of payments
- It produces the weekly 'catering return'. This used to take all morning, and we now do it with a 'click!' ...and last but not least...
- In a busy primary office interruptions occur – with the module I just pick it up again, instead of having to start the calculations again!



St Mary's Catholic Primary School

St Mary's Catholic Primary's administrators Ros Perrin and Gill Piddock saw a demonstration of SIMS Dinner Money last summer, and thought it would save time in their busy office. St Mary's has nearly 250 pupils on roll, with between 70 and 110 pupils taking a meal daily. Ros and Gill were also attracted by the software's ability to produce reports, audit the meals taken, and by whom! Nine months on, I asked Ros if Dinner Money was living up to expectations. She told me that:

- Dinner Registers are no longer hand-written – a considerable time saving with 9 classes. Dinner Money's registers include a default meal pattern, thus saving even more time
- Lunch money administration time has been cut to about 10 minutes per day
- Monday's 'inputting' of money now takes about an hour – previously it took all morning!

- We produce statistics for the kitchen daily - we can put in pupils' specific dietary needs such as allergies, vegetarians etc – and also for teachers!
- The software produces a list of meals taken by class – this is ideal for the supervisors (who supervise on a class basis)

No supervisor knows which meals are paid, and which are free. This supports our inclusion policy.

- The module does all necessary calculations – and if we make a mistake it tells us! (ed: this software is even cleverer than I thought!) For example, if we code an amount to the 'wrong' child, we can vire to correct the mistake!
- It produces 'bad debt letters'. (Head Teacher Jane Dalloway told me at this point that St Mary's has 'zero tolerance' of bad debt, supported by Dinner Money)
- Auditing is easy and accurate



SIMS Dinner Money

Sandwell LEA's Support

The verdict? St Mary's staff are delighted with all these benefits! Ros and Gill also have plans for the future: Dinner Money includes statistical analyses tools that will enable St Mary's to predict meal requirements accurately, thus ensuring 'value for money' from the caterers.

Sandwell's SMIS (Schools Management Information Systems) Strategic Manager Paul Butler told me why he chose to encourage and support the use of SIMS Dinner Money.

"The schools dinner service, including the free school meals budget, has been fully delegated to schools. The schools are now responsible for all accounting, including debts. We saw that by using the Dinner Money module, the Primary Schools would save valuable (and scarce!) office time, and would also satisfy audit procedures"

Paul explained that Dinner Money's functionality and processes needed to satisfy Sandwell's Audit Services first of all. Once Dinner Money had this 'green light' he and his colleague Jackie L'herroux asked for some volunteer schools to pilot the module late last summer. A small number of very keen schools came forward, including case studies Old Park, St Mary's and Whitecrest Primary (also very keen users).

As a result of their positive response to the benefits of the software, more than 30 of Sandwell's primaries have chosen to use Dinner Money.



In addition, at the end of the pilot a very productive meeting was held between Capita Education Services finance team, Sandwell Auditors, SMIS and the Pilot schools to develop the software.

Jackie and Paul are training and installing the software in a carefully managed programme that allow them to support each new user appropriately. Each school receives a half-day on-site installation, and a further visit a week later, to iron-out any initial difficulties. In this way, the schools are up-and-running with Dinner Money and immediately seeing the benefits!

This programme is a fine example of the benefits of the partnership between SIMS and over 150 LEAs in England, Wales and Northern Ireland, to implement and support time-saving SIMS modules that help make life easier for administrative and teaching staff in our schools.

Sandwell SIMS Support Team has recently gained Capita SIMS Accreditation status. Congratulations to Paul and his team – we will report further on their success in our summer edition of Achievement.



Competition

WIN a digital camera, Microsoft® MapPoint® or a portable computer!

SIMS User Survey

At SIMS we endeavour to design and develop MIS solutions that meet your needs. The SIMS User Survey provides us with the opportunity to gain invaluable feedback, helping to shape key decisions in the future of SIMS. Complete our SIMS User Survey (for details please see enclosed survey form) for your chance to win a digital camera, one of 10 copies of Microsoft® MapPoint® or a portable computer for your school!

eNewsletter

Each month we send out a free eNewsletter to keep SIMS users up to date on SIMS developments. To register or to view the latest eNewsletter visit www.sims.co.uk <<http://www.sims.co.uk>> .

Coming Soon...

In the next edition of Achievement (Summer 03) we will report on more timesaving with SIMS at reference site Stoke Park Community Technology College. Simon Smith from the school gives us a preview:

"We have recently continued our ICT development with a move into e-commerce. Suppliers are now paid using the BACS system, with a simple link from FMS6 to their bank Lloyds TSB. The whole system of payment of suppliers has been greatly streamlined with this simple-to-use part of the FMS6 programme".

