



WILLOW DENE SCHOOL

Strategic Development Plan 2020-21

To further develop organisational systems, storage and distribution which improve procurement thus ensuring that the optimum resources are available and accessible within an efficient budget management system

**Overall aims**

- To develop systems for more regular and detailed financial information sharing so that there is a more collaborative approach to procurement which enables people to purchase in a more informed way
- To design and implement systems to encourage responsive procurement in a timely way, taking into account staff feedback about developments so far
- To expand and embed pilot projects and systems under development to support all staff in procuring the right resources, whilst securing best value for money within the MAT financial regulations
- To investigate the options for improving organisational systems, storage and distribution so that flow of ordering, distribution and stock management meets teaching and learning needs

Strategic Aim	Key tasks	Accountability	Timescales						Desired impact
			T1	T2	T3	T4	T5	T6	
To develop systems for more regular and detailed financial information sharing so that there is a more collaborative approach to procurement which enables people to purchase in a more informed way	<ul style="list-style-type: none"> <li>• To ensure knowledge gained from last year is capitalised on through a summary and calendar date record of key financial dates</li> </ul>	SC							Staff have more knowledge and understanding of Willow Dene's financial framework and use this to guide their procurement
	<ul style="list-style-type: none"> <li>• To reflect the new roles in the expanding finance team and how they will interact with school staff by producing an admin team guide for staff</li> </ul>	SC/RH	→						Core priority work impacts positively on staff wellbeing
	<ul style="list-style-type: none"> <li>• Improve systems to support staff to track orders</li> <li>• To provide detailed and regular cost centre monitoring reports and to use feedback to improve systems</li> </ul>	SC SC/RH/SC	→					→	All staff know the role of the shared finance team and how they can help. This means that that procurement is more responsive
	<ul style="list-style-type: none"> <li>• To develop an interface to develop deeper governor understanding of the budget setting processes and the key complexities of this</li> </ul>	SC/RH							→
									There is increased awareness of funds and budgetary constraints leading to increased accountability amongst cost centre holders, thus improving financial planning and enabling better planned, less responsive purchases
									Governors have a more detailed understanding of finance procedures at Willow Dene and a forum for learning and dialogue

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<p>To design and implement systems to encourage responsive procurement in a timely way, taking into account staff feedback about developments so far</p>	<ul style="list-style-type: none"> <li>• <b>Improve the flow of communication about procurement timeframes which builds on the existing work, to link with collaborative planning</b></li> <li>• <b>Identify frequently used suppliers in order to set up account agreements</b></li> <li>• <b>Work collaboratively with curriculum leaders so that procurement of teaching resources supports the curriculum and reflects priority areas</b></li> <li>• <b>Incentivise staff to look at sourcing resources more broadly from a range of suppliers</b></li> </ul>	SC/RH		→					<p>There are systems in place which ensure that staff are fully informed about key finance dates and reminded about them</p> <p>Procurement processes improve alongside the priorities of subject leaders, encourage timely planning, minimise teacher expenditure and encourage collaborative procurement</p> <p>There is smoother access to frequent suppliers with less cash expenditure and pressure on teacher finances</p> <p>Staff are able to see the benefits of using other suppliers, therefore they are securing the right resources at best value for money</p>	
		SC/RH					→			
		SC/RH			→					
		SC/RH			→					
<p>To expand and embed pilot projects and systems under development to support all staff in procuring the right resources, whilst securing best value for money within the MAT financial regulations</p>	<ul style="list-style-type: none"> <li>• <b>Revisit systems for internet ordering in the light of learning from the previous year to address credit limits and allocation of tasks and to manage workload for teachers and finance team</b></li> <li>• <b>Develop a system of staggered deadlines so that not all internet orders are made at the end of term</b></li> <li>• <b>Ensure that all staff involved with procurement understand the processes for internet ordering so that there is equality of opportunity across the school and roles</b></li> <li>• <b>Support new staff to understand finance systems including local purchasing by adding to induction processes</b></li> <li>• <b>Produce an FAQ to support staff to troubleshoot issues related to delivery</b></li> <li>• <b>Utilise knowledge gained to positively affect the potential for internet ordering elsewhere in the Trust</b></li> </ul>	SC/RH		→					<p>Internet ordering processes are streamlined, embedded and manageable for all staff</p> <p>Staff are approaching procurement from a considered point of view</p> <p>There is less pressure on the finance team as staff are more informed. The introduction of staggered deadlines means that processes are manageable and fit within financial timeframes for all</p> <p>There is a better overview of local and internet purchasing, and it is better informed. Commonalities can be recognised and capitalised on.</p> <p>New staff understand financial regulations and procurement systems</p> <p>Staff have more autonomy in following up delivery issues</p> <p>Good practice is disseminated Trust-wide</p>	
		SC/RH			→					
		RH/SC				→				
		SC/CB/KW	→							
		SC/RH	→							
		SC/RH						→		

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To investigate the options for improving organisational systems, storage and distribution so that flow of ordering, distribution and stock management meets teaching and learning needs	<ul style="list-style-type: none"> <li>Expand and embed bulk buying systems, addressing feedback from staff survey</li> <li>Develop the teacher resources room as a responsive way to meet supply and demand</li> <li>maximise on excess which is currently stored in classrooms so that it can be collected and redistributed</li> <li>implement systems so that broken items are regularly collected, recorded and repaired or replaced, building a picture to support long term sustainability and recycling</li> <li>To investigate the potential for using the NHS central equipment store for specialist equipment</li> <li>Evaluate the effectiveness of using 'the portal' to secure premises related items</li> </ul>	RH/SC	→						<p>Contexts for bulk buying are expanded. This enables further cost saving, improved access and decreases teacher workload</p> <p>The teacher resources room is reconfigured as a responsive, stock controlled, functional distribution centre</p> <p>Static stock in classrooms is redistributed, ultimately affecting configuration of future orders</p> <p>Broken items are repaired where possible, saving money and lessening negative environmental impact over time</p> <p>The school is securing and storing specialist equipment in the best way to secure the right equipment in a timely and cost-effective manner</p> <p>Systems for ordering local stock are reviewed and improved</p>
		RH/SC/CC	→						
		RH/SC/CC		→					
		RH/SC/CC			→				
		RH/SC/CH/AG			→				
		CC/RH/PW				→			
							→		