



SOUTHGATE COLLEGE GOVERNING CORPORATION

Finance & Staffing Committee

Minutes of the Part 2 agenda meeting of 25th February 2010 held at Southgate College, commencing at 6.00 p.m.

Attendance

Members

Ann Zinkin (Chairman)
David Byrne (Principal)
Ron Lis
Andrew Nicholas

In attendance

Lizzie Jones (Head of Service Transformation)
David Chaplin (Chaplin Frobisher Welling, Clerks to the Corporation)

Proposed Structure Changes affecting Business Development Unit and Vocational Curriculum Teams

Lizzie Jones presented a paper reviewing the existing arrangements within and between the Business Development and Vocational Teams at the College covering employer responsive programmes (including Train to Gain (T2G) and Apprenticeships), project generated provision (individual bids won by the College and separately funded), Full Cost Recovery (FCR) and general employer engagement activities.

The Business Development Unit (BDU) was primarily responsible for the attraction, development and monitoring of employer responsive courses and provision. However the majority of the delivery for the employer responsive and project provision sat within the academic teams within the Division of Vocational Education although some cross college delivery also existed.

The current structure covering employer responsive provision demanded close working between the BDU and Vocational teams; however this had not been successfully achieved. In 2008-09, the maximum contract value for Employer Responsive Provision was not achieved due to quality issues (both internally and with third party providers) and untimely completion of learners on programme.

The Vocational Academic teams sat completely independent from the BDU within the College structure with a separate Director and management structure for each. There were no formal arrangements for combined management of employer responsive and full cost provision across the two teams which had led to inconsistent application of employer and full cost co-ordination and delivery with differing priorities and targets being set across the two divisions. The Vocational

Teams were not sufficiently aware of the work undertaken by BDU to enable effective curriculum planning for the successful delivery of such projects.

The ability for both BDU and Vocational delivery teams to be flexible and creative to both identify and deliver alternative funding streams was becoming increasingly important for the College.

The existing Sales Team (comprising 2 Sales Executives) were responsible for developing links with employers and community groups, attracting new business and introducing new leads to the College. The Sales Executives work to targets set by the BDU (mainly centred around the attraction of new customers / leads) and often exceed these targets. However, the conversion rate and successful completion of the learners attracted was not at the level the College aspired to. Although the Sales team had forged important links with local employers and community groups, because of new strategies and priorities regarding work experience and volunteering requirements for learners these links need to be widely accessible, but the existing focus of the offer promoted by the Sales team was quite narrow.

The Sales team need to be more informed regarding the whole planned offer within Curriculum Teams and to support the sale of the full “product” to all employers and community groups known to the College, and to use the links developed to support the wider work of the organisation in relation to work experience, voluntary groups, job brokerage and job fairs.

A Customer Relationship Management (CRM) software system had been introduced in 2008 and was used (at a minimum level) by the Sales team and other members of the BDU to track communication with our customers. It was not widely used and was not fit for purpose as it does not provide the information needed by the College as a whole to effectively market and deliver our provision or look after our main accounts.

The Marketing Team within BDU is responsible for internal and external advertising, external promotions, internal events, production of the prospectus and press releases. This is a small team and there are naturally limitations to the work undertaken. There is currently no central marketing strategy within the organisation and no managed co-ordination of marketing support for new courses. Limited budget is often given as a reason for not being able to support marketing of new courses/provision.

Given the strategic vision to work more closely with employers and the local community and provide learning opportunities which meet the needs of the local area, support across the College in marketing these programmes and the use of informed, market intelligence is a necessity to differentiate the College from other local providers.

The Marketing Team also use the CRM system to identify established links with employers and the community but given the limitation already identified in relation to the CRM, this restricts our current market intelligence.

The internal events co-ordination which is also undertaken by the Marketing team continues to be a key requirement of the College, although effective use of the budget available needs to be considered and equally apportioned to attraction and

celebration. More innovative ways of marketing the College need to be identified and informed by the Marketing team based on the local market intelligence identified by the team.

The BDU currently has a small team of project managers and a project coordinator who are mainly responsible for monitoring project delivery against service levels and data input and tracking. There is some duplication of input of data and tracking systems within BDU, particularly for Train to Gain learners. Separate spreadsheets and databases are kept to track learners in addition to the information being held on the College's Student Record System (Unit-e) which is not only duplication of input but also leads to inconsistent information being held and used for reporting, tracking and modelling purposes.

The Business Process Review project currently being undertaken within Admissions and MIS is reviewing the processes followed from enquiry and application through to enrolment and as part of this project, the processes followed within BDU will be incorporated, to streamline these where possible and remove duplication.

Due to the different tracking systems being used, checks are regularly undertaken between the two data sets to ensure accuracy which is a time consuming exercise and unnecessary. This duplication cannot continue and the main College systems must be used going forward as the single data capture and reporting tool.

Regular meetings are chaired by the BDU with curriculum delivery staff to monitor the progress of learners, historically concentrating on Train to Gain learners. These are the only group meetings between the two teams currently undertaken. The majority of other requests for information by BDU from curriculum delivery teams are circulated by email for response.

Development of new apprenticeship schemes are a clear focus within the recently published Statement of Priorities and historically, the attraction, tracking, quality checks and monitoring has been undertaken by the BDU. The new arrangements and implications for the College are currently being reviewed by curriculum teams as part of the development planning process and Apprenticeships form a key element of the employer responsive provision within vocational areas of delivery going forward.

The volume and funding allocated to Apprenticeships for 2010-2011 is not yet confirmed but the tracking, monitoring and quality assurance requirements need to be considered and reflected within the structural changes proposed.

Recent national developments within Further Education provide greater emphasis on work experience and employability skills for all learners with a view to reducing unemployment levels and encouraging and preparing learners for the work environment. This is supported further within the recently published IAG strategy detailing further development of careers support, advice and guidance as a key priority which is dependent on closer links between the College and Employers to ensure that learners are equipped with the skills that employers require, whilst meeting the priorities within the Local Place Setting Agenda. At present not all learners undertake work experience and there is no central College budget or organisation of placements which are undertaken. The recent strategy from the Department for Children, Schools and Families "Quality, Choice and Aspiration – A

strategy for young people's information, advice and guidance" identifies the benefit of work experience for all learners and ensuring that placements offer "sufficiently meaningful insight into what the workplace is really like".

The need for clear links and communication channels between the Sales, Marketing, Information Advice & Guidance and curriculum teams in relation to building, recording and utilising employer and community links to support this strategy and provide the learner with their full entitlement is one of the objectives of this review.

A further weakness of the existing arrangements is that there is little clarity as to how Full Cost Recovery (FCR) activity is assessed, delivered and recognised. Much of the FCR activity is "converted" funded work and little development appears to take place. Part of this malaise is caused by vocational teams not having rigorous targets to meet, nor the reward or the incentive of a real return on activity. The overall picture is made more confusing by the fact that the BDU has historically "reported" the actual FCR performance, despite much of the work being delivered by vocational areas.

This arrangement will not serve the College at the level needed to forge ahead with innovative and radical approaches to FCR engagement.

Proposals

Further analysis of all of the above issues had identified the need for a structural review of the BDU and Vocational divisions to streamline the structures where possible to remove existing duplication and improve the working relationships, communication, quality of delivery, compliance and the learner experience.

Lizzie's paper then set out in great detail the current organisation and staffing structures, and detailed the proposed changes

Organisational Structure and responsibilities

1. Overall Structure.

It is proposed that the management structures for the Vocational and BDU are merged in the new structure and report into one overall Director of Skills, Employment and Delivery. The aim of streamlining the management structure is to improve the communication and monitoring of performance, ensure consistent prioritisation of attraction and delivery targets and promote closer working relationships between the existing teams. This proposal will also raise the awareness of the work undertaken by both parties and assist with the curriculum planning and delivery of employer responsive and project provision.

The commercial attraction and monitoring work within the new directorate is proposed to be managed by an Employer and Community Partnership Manager. A key element of this role will be to work closely with Assistant Directors to identify and write new bids to obtain new streams of project funding. In addition to Bid Writing, this post is proposed to manage the "Sales" Officers and Business Partners and will have overall responsibility for data management and control, external

relationships and promotion and will oversee the contracts delivered and monitored within the Directorate. It is proposed that this post will have a base line and will be subject to targets in relation to successful bids and performance of contracts which attract bonus payments.

2 From attraction to Completion.

A team of 3FTE Sales Officers is proposed within the new structure These posts will be primarily responsible for attracting new learners to the College across all funding streams. These posts will be allocated to Assistant Directors and will be required to work closely with the Assistant Directors to identify and deliver a Sales strategy for the divisions which will, in turn, be linked to their individual targets for bonus payments. The offer promoted by these posts will span the whole curriculum and key target areas will be discussed and agreed with the Assistant Directors' and Employer and Community Partnership Manager. In addition to attracting new learners, these posts will be required to use the relationships with employers and community groups to promote and obtain placements for work experience and volunteers and the Sales Officers will work closely with ADs and the IAG team to ensure these links are communicated and result in placements being undertaken. In addition, the Sales Officers will work in partnership with the Business Partners who will also be allocated to Assistant Directors and will be jointly responsible for building and maintaining effective relationships with employers and community groups.

A base line salary is proposed for the Sales Officers along with the ability to earn bonus payments linked to sales and delivery targets. These targets are likely to cover the following areas:

- Sales – as agreed with the Employer & Community Manager, in consultation with the Assistant Director
- Conversion of leads – as agreed by the Employer & Community Manager, in consultation with the Assistant Director
- Work Experience Placements identified and undertaken
- Volunteer Placements identified and undertaken
- Completion of Learners attracted – as agreed with the Employer & Community Manager, in consultation with the Assistant Director
- Number of new employers and community groups identified and used – as agreed with the Employer & Community Manager

In addition, it is proposed that an additional annual bonus payment will be made to the Sales Officer and Business Partner who attracts and converts the most learners that successfully achieve and complete their programme.

The need for a whole College CRM has been identified and will be achieved as part of this review. The Sales Officers will be responsible for identifying and recording all employer and community links within there area of responsibility and ensuring that these links are available as a resource across the College.

3.Delivery, Tracking, Monitoring & Quality.

The new structure includes a proposal for 3 FTE Business Partners who will be responsible for managing the relationship with employers and community groups alongside the contract monitoring, tracking and compliance. The contracts managed

within this team will be any employer responsive funded provision including Train to Gain and Apprentices alongside any projects successfully bid for.

It is proposed that the Business Partners will be allocated a Sales Officer who they will work with to attract new and maintain existing relationships with employers and community groups. In return, these posts will be assigned a baseline salary and will also have the opportunity of earning additional bonus payments related to contract performance standards to ensure that the funding from this provision is maximised.

The Business Partner posts will play a key role working closely with Assistant Directors to ensure that learners on programme are on track and that the relevant paperwork is completed and returned in a timely manner. It is proposed that the Business Partners will be required to hold regular meetings with their allocated Assistant Directors to discuss any issues encountered and monitor the progress of learners through the provision of regular reports. These reports should provide the Assistant Director's with key management information including, but not limited to:

- Number of learners on programme against target
- Number of timely completion
- Learners due to complete in the next 3 months
- Any "at risk" learners
- Outstanding paperwork requirements
- Number of applicants

It is proposed that the Employer and Community Partnership Manager will be responsible for working closely with Assistant Director's, as appropriate, to identify the resource requirements for delivery of projects and agreeing the resource plan for such delivery to ensure that sufficient resource is available and budgeted before the submission of any bid. The Business Partners will then be responsible for monitoring the delivery and associated income and expenditure against the contract terms to ensure targets are realised and report this to the Employer and Community Partnership Manager on a monthly basis to inform the Leadership Team Performance meeting.

The current processes undertaken within this team for the enrolment and tracking of learners is to be reviewed to streamline the process and remove the duplication which currently exists. It is proposed that the Business Partners are given access to UnitE and provided with training on the enrolment processes to enter the information directly into the system at source and for work to be undertaken with the CIS team to enable UnitE to feed the tracking spreadsheets kept to monitor progress of the learners on employer responsive and project provision.

Whilst it is proposed that the Quality Assurance procedures and responsibility remains with the Assistant Directors in terms of delivery, the Business Partners will be responsible for ensuring the contract requirements for learner experience, monitoring and paperwork requirements for audits are met and that any associated surveys or feedback requirements are completed before, during and at the end of the learning agreement (as per the contract terms).

4. Marketing.

It is proposed that the existing Web Developer post transfers across to the CIS team, given the recent change of emphasis and ongoing development and maintenance of the website. The skills of the Web Developer mirror the skills

required for the development and maintenance of the College's intranet and Columbus and this post has been working more closely with the CIS team in recent months regarding such developments.

The proposal for the existing Marketing functions is for these to be transferred to the team of Admissions and Registry and for the post of Marketing Manager to be removed and a new post of Information, Communication and Events Manager to be introduced to the structure. This post will be responsible for the management of the existing Admissions team and transforming the work of this team to provide a course information facility for all enquiries, capturing key market intelligence at first point of contact and improving the current conversion rate through access to accurate and informative information when requested and identification of customer learning requirements.

It is proposed that the Information, Community and Events Manager will have overall responsibility for the following functions:

- Co-ordination and planning of any corporate earner events within the College;
- Production of a corporate marketing strategy in collaboration with the Assistant Directors, to ensure it meets the marketing needs of each division;
- Identifying, utilising and sharing market intelligence (including contact received by the College as well as demographic information) to inform the marketing strategy within the College and ensure that annual learner targets are achieved;
- Production of full time and part time prospectus, using alternative and innovative methods, as identified, to market our courses to prospective learners;
- Attendance at all learner events to promote the College to prospective learners;
- Undertake research and analysis to inform market intelligence and utilise this to inform curriculum developments;
- Implement innovative methods of marketing and attracting new learners to the College, using market intelligence identified;
- Overall responsibility for the effective utilisation of the marketing budget, prioritising spend to achieve learner targets;
- External celebration of College success (including press coverage).

The existing Admissions team already support the information, communication and events within the College and this is proposed to continue within the new structure. It is therefore proposed that the existing Marketing Assistant post is removed from the structure.

5.Administration.

The low number of visitors (with the exception of LUK visitors attending to undertake their test) to Southgate House does not warrant the requirement for Reception cover. The roles of the existing team have been discussed with the existing Director of Business Development and the Admissions and Registry Manager (responsible for the Reception on the Main Site) with a view to identifying alternative methods of delivery.

The LUK and CSCS Card Tests at present are booked to take place in Southgate House due to the current exam and rooming requirements, however alternative accommodation is also being reviewed as part of this proposal.

It is proposed that the Reception point in Southgate House is removed and that all visitors (including those attending to undertake LUK and CSCS tests) are directed to the Main Reception point. The majority of people attending to undertake these tests have to make a payment at the main reception point so this should not affect service levels to these customers.

In addition, any visitors attending for an appointment in Southgate House will be required to report to the Main Reception where the relevant visitor badge and arrangements can be provided and then either directed to Southgate House or collected by the person they are visiting.

Following the introduction of the CSCS card and due to recent turnover of staff who are eligible to undertake the Test Supervisor role for the LUK tests, the Admissions and Registry staff have been registered to undertake the Test Supervisor role on a rota basis. As a result, the requirement for dedicated Test Supervisors is removed. It is proposed that the existing LUK / CSCS Test Centre Manager and Supervisor posts remain in the structure to undertake the co-ordination, testing and ensure contract compliance for these tests and that these posts are transferred to the Admissions and Registry team and report into the Admissions and Registry Manager.

Therefore, in line with the proposal for the existing BDU and Vocational Teams to merge, the requirements for a separate reception and administration team is also removed. Any remaining administration requirements are proposed to be undertaken by the Centre Office staff and as such, it is proposed that the existing posts of Administrative Assistant and Receptionist currently within the BDU team are removed from the structure.

6.Full Cost Recovery (FCR).

It is proposed that FCR activity is made a clear KPI within each curriculum area, with the accountable officer being the overall Director.

Staffing matters

To implement the new structure set out above considerable staffing changes (either of Job or of people) will be required. The following tables provide a summary of the proposed structure changes detailed above and the number of posts potentially affected.

Proposed Changes

Proposed Posts to be Removed	FTE Affected	No. of Posts
Director of Business Development	1.0 FTE	1
Director of Vocational & Adult Education	1.0 FTE	1
Business Development Manager	1.0 FTE	1
Account Manager (incl. ESF Manager)	2.0 FTE	2

Project Manager	0.5 FTE	1
Volunteer Placement Officer	0.5 FTE	1
Sales Executives	2.0 FTE	2
Centre Administrative Assistant	1.0 FTE	2
Marketing Administrative Assistant	1.0 FTE	1
Marketing Manager	1.0 FTE	1
Receptionist/Administrative Assistant	0.61 FTE	1
Train to Gain Co-ordinator	1.0 FTE	1
TOTAL	12.61 FTE	15

New Posts	FTE
Director of Skills, Employer & Community	1.0 FTE
Employer & Community Partnership Manager	1.0 FTE
Business Partner	3.0 FTE
Sales Officers	3.0 FTE
Information, Communication & Events Manager	1.0 FTE
TOTAL	9.0 FTE

In accordance with the Management of Change policy, it is proposed that 70% of the following posts will remain unchanged, and will therefore transfer to the new structure without the requirement for application or selection for appointment:

Proposed Assimilation

Existing Post	Existing FTE	Proposed Post	Proposed FTE	Vacant Posts FTE
Sales Executive	2.0 FTE	Sales Officer	3.0 FTE	1.0 FTE
Marketing Manager	1.0 FTE	Information, Communication & Events Manager	1.0 FTE	0 FTE
Web Developer	1.0 FTE	Web Developer	1.0 FTE	0 FTE
LUK Test Centre Manager	1.0 FTE	Test Centre Manager	1.0 FTE	0 FTE
LUK Supervisor	0.5 FTE	Test Centre Supervisor	0.5 FTE	0 FTE
TOTAL	5.5 FTE		6.5 FTE	1.0 FTE

In addition, it is proposed that applications for the posts of Business Partner (3.0 FTE) are ring fenced initially to the following post holders:

Proposed Ring Fenced Posts

Existing Post	Existing FTE	Proposed Post	Proposed FTE
Account Manager	1.0 FTE	Business Partner	3.0 FTE
Project Manager	1.5 FTE		
T2G Project Co-ordinator	1.0 FTE		
TOTAL	3.5 FTE		3.0 FTE

Members thanked Lizzie for her very detailed and clear report. The proposed changes seemed to Members to be a rational proposal to achieve strategic objectives which had been endorsed by the Board, and the Committee was happy to endorse them.

The meeting ended at 6.20 p.m.