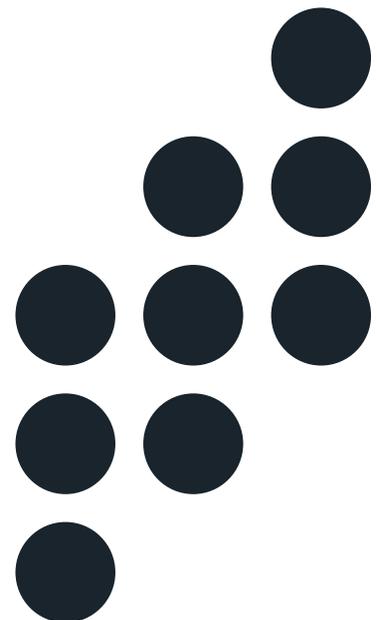




Oakwood School

Small school,  
no need for MIS...  
think again!





Oakwood School is a co-educational day school for 2-11 year olds. It offers a pre-school, pre-prep, and prep school for 260 pupils and has 60 members of staff.

On the following pages Ian Brittain, Bursar of the school describes the selection, implementation and progress of a new management information system.

I've been Bursar of Oakwood School, an independent school with 260 pupils in Chichester, since January 2015. At that time, the school had an accounting system that also had elements of an administration system within it.

As was typical of many schools, it was operating a number of databases to record and keep track of pupils and school activities. We had no MIS (management information system).

We most urgently needed something to support our academic and administration data management. We also needed to update our finance and accounting system which was old.

We did have an Access database for our pupil registration, but it was an isolated tool, written and solely supported by our IT manager, which made it a vulnerable system. That was something that we clearly wanted to move away from.

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As a school, we had done a good job of tracking pupil performance and progress. But because of using spreadsheets, it was a disconnected and disjointed process, time consuming for everyone, and very difficult to get a holistic view of each child.

In addition, although the school was producing regular reports on pupil progress, these were again being created on a report

template devised and maintained by our IT manager.

Our parents weren't able to review the report electronically; it had to be printed and sent out to them.

Data collection, pupil registration and tracking of pupils was all very disparate.

### Making a change

At certain stages in your school life, it's necessary to re-evaluate the way you manage your data.

If you've been using a system for a few years, it's important to stop and ask if it's giving you all the benefits that you need.

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“Software is improving at such a pace that your tech products need to be updated and refined regularly, or you end up with a legacy product.”

Some schools are reluctant to make a change because of the cost and the time required for selection, decision-making, staff training and implementation, and so it's tempting to continue with what you know. But over time, the system becomes less of a benefit, more fragmented, and more out of date.

Software is improving at such a pace that your tech products need to be updated and refined regularly, or you end up with a legacy product. So, the need to move to something new is inevitable.

We recognised that, as a school, we were at such a stage; where we needed to bring our management of all data into an integrated system.



We felt that building our own would be a big risk. External providers would not only provide us with a functional product, but the best suppliers would be able to give us their expert knowledge, support, integrity, management, and access to a community of like minded users.

So, we agreed to invest in a reputable MIS brand to ensure sustainability and optimum use.

### Finding a suitable provider

We looked at three different systems during our selection process. We ultimately selected WCBS.

A number of points helped us in our decision making:

- A study carried out of independent schools showed that WCBS was widely used and widely recommended.
- We knew local schools were using WCBS, which helped with recommendations and references.
- WCBS provided the opportunity for us to have an integrated system, meaning our

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staff wouldn't have to input data into different systems; a single data input would be able to feed into all our tools and through to all our departments.

- As a small school, there were MIS elements that we didn't need, but with WCBS, we could purchase what we needed piecemeal and on a phased basis.
- We met WCBS representatives on several occasions during the selection process. They demonstrated their data management system and its flexibility and were able to reassure our leadership team that the WCBS brand was the right choice for us.

### Making a difference to a small school

When you first look at any MIS system, it can be quite daunting. They tend to be built to support all sizes of schools including much

larger schools than we are. It was important for us to identify only the parts that were necessary for our school. We kept it simple and that's been a big part of its success.

Today, all of our data is held in our core WCBS management system which supports academic, finance, school office, and administration departments.

We chose to use WCBS tools for registration, and HR which gives us valuable analysis to support our staff, such as tracking staff absences.

We also use the WCBS report builder which gave us a choice of templates that can be published in pdf and are accessible to parents through the school portal – no more printing out of reports!

All our data remains fundamentally within a WCBS system, held on a local server, and backed up daily.

We are ever mindful of our data security and WCBS gives us the assurance that our data is as secure as it can be.



Now that the data is integrated, there is much less manual intervention required for maintaining the data records and, as a result, we have seen both time and cost benefits.

Everyone uses it rather than just the pupils, including our parents. It's a way for the entire school to be well informed about every child.

I can find out everything the school knows about each child; their learning progress, grades, pastoral care, merits, sanctions; all through one single WCBS platform. That's a real advantage for us as a small school.

### Getting up and running with MIS

We recognised that the transition and introduction of a new information management

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system was not going to be easy, so we worked with WCBS to create an implementation plan and timetable to suit our needs.

James Darlington from WCBS was excellent as our project manager, providing a courteous, informed and practical project implementation framework.

It was a workable implementation process but still quite challenging and we adjusted where we found it necessary.

We signed the contract for our new management system in September 2015. Data migration took place the following month.

Initial training of the academic and administration departments was spread over a period of three months, between November 2015 and January 2016, followed by implementation. Training of our finance module took place during the summer of 2016 and this was implemented the following January.

WCBS worked closely with us to support our implementation. We benefited from having a dedicated trainer who got to know our particular requirements and challenges, and the individual needs of our staff.

This was especially helpful when training the teachers on the academic module. Our Head and the entire senior leadership team were totally behind the project and were visible in their support and participation to drive forward





the implementation in a positive way.

This made a big difference to ensuring implementation went to plan.

The training from WCBS was excellent and we felt well supported by our trainer and project manager all the way through.

“We also needed champions; people who were enthusiastic about a new MIS.”

Staggering our launch of the different modules helped us; we selected times of the year when transition was best for everyone in the school.

For example, transitioning across to the finance package in December and January was easier for us than at the start of the school year.

Allocating enough time to ensure everyone was able to learn and get to know the

system, to understand its uses and benefits, and feel comfortable as a user, was vital.

We also needed champions; people who were enthusiastic about a new MIS and sufficiently able to help drive the three distinct parts of the implementation; for academics, finance and administration.

I identified three key people from different departments of the school to do this. We trained them up first and made sure they were well informed so that they could provide necessary support within their departments.

WCBS has produced a system that's been designed to be user friendly. As well as the staff training, there are workshop guides and we have access to the WCBS helpdesk.

Internally we maintain a point of contact for people who struggle, and on the teaching side, there is a member of staff who has been assigned the role of academic data

manager and has gone through additional training to be able to offer assistance to our teachers. For our staff, knowing the various ways to get help has been very reassuring.

**Supplier and customer:  
an active partnership**

It has been important for the school to have a very strong partnership with WCBS and we recognise that we are both responsible for making sure the system works to best meet our needs. Of course, we have had challenges, but together with WCBS we've worked them out.

We've also acquired valuable advice from other user schools. It was following the example of another school that we refined roles and responsibilities after implementation and appointed an academic data manager.

Being part of a community of schools, learning from them and their own case studies has been beneficial.

## Advice to other schools from Ian Brittain

There are many MIS options on the market. If you are considering an upgrade or a completely new system his recommendations are:

### What to look for when selecting a new MIS

- Take time to look properly at a number of different providers.
- Draw on feedback from many people in the school because everyone will have different needs and requirements. As well as your senior leadership team, involve your head of academic, head of pastoral care, admissions team, finance team, IT and school office in the early identification of your needs. Make sure they explain clearly what they need and also what they would like from a new system. This will ensure you are looking for a system that meets everyone's requirements.
- Identify the key features and provision that you need, and compare and contrast these against every system and supplier that you short-list.
- Make sure you like, trust and can communicate well with the representatives from your chosen supplier.

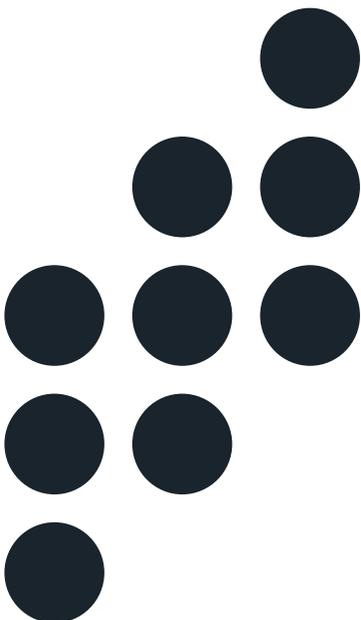
### Implementing MIS

- It is really important that your senior leaders support your implementation 100% and ensure it goes to plan. Their active and visible support is crucial to the success of a new system.
- Getting buy-in from everyone can be challenging. You have to work hard to achieve that, making sure communication is extremely positive; highlighting

the benefits of the system relevant to the individual, and providing everyone with enough support.

- Train up enough people so that you have skilled backup on all modules which is important because of attrition and to ensure longevity. For example, our finance system has three different people who are competent to use it.
- When you are going through implementation, watch for the impact that implementation might have on existing roles and responsibilities.
- Look for ways to capture successes and benefits experienced by individual users and share them with everyone. Identify challenges that are faced by individuals and address how these can be overcome with everyone.
- Your local IT manager needs to be actively involved in the migration of the data, and to help with some of the more technical aspects of the system, such as software upgrades, etc. As well as being a part of the initial decision-making and implementation team, they need to be a key part of the system maintenance and sustainability team.
- We take the opportunity at our regular insets to have a number of staff awareness sessions, even if they're just refreshers. A recent refresher focused on using our pastoral module for recording merits and sanctions. Ongoing support and refreshers will help to ensure your MIS is being used in the best possible way for your school.





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