



Making the most of technology in Peterston – eTrading for Schools in action



“Prices on invoices are exactly the same as on the system. Even the VAT is correct. There is no manual adjustment to do, making invoice matching so fast”

Driving through the rural community of Peterston Super Ely you might find yourself wondering why it looks so familiar. That's because the village, situated just 8 miles outside Cardiff, and its church, have recently been the star of BBC's Gavin and Stacey. At the heart of this picturesque and thriving community is Peterston Church in Wales Primary School, home to 180 primary and nursery aged pupils.

Headteacher for 20 years, David Griffiths has a busy schedule balancing responsibilities at the school with a secondment to Cardiff County Council as Primary Advisor to Cardiff school, and this year as President of NAHT Cymru. Now David and his school have also become one of the Vale of Glamorgan's pioneers for the new eProcurement system eTrading for Schools.

What is eTrading for Schools?

eTrading for Schools is an eProcurement tool specifically tailored to the needs of schools. It provides a simple, secure, online service for schools to select goods and services from regional and national suppliers and frameworks; and can be integrated with existing SIMS financial management systems.

eTrading for Schools is delivered by the Assembly Government's Value Wales division. Through the xchangenwales programme, Value Wales aims to create efficiencies in the Public Sector through the delivery of electronic procurement products and services, lowering the cost of doing business for both the Public Sector buyer and supplier. Savings in the range of £70m - £200m are estimated over the 5 year life of the programme. Participating organisations – for example, schools, local authorities, housing associations – retain all financial and efficiency savings made.

Having taken part in 2009's successful pilot of the system, Vale of Glamorgan Council is now rolling it out to all 59 of its schools: Lesley Matthews, SIMS & School Support Co-ordinator, Vale of Glamorgan Council notes: *"Schools increasingly face procurement challenges, especially with the budgetary constraints in the current climate. The eTrading for Schools portal provides schools with a secure electronic environment for best value purchases so that they can make savings and efficiencies. This was one of the driving forces in engaging xchangewales to roll-out the portal to Vale schools."*

Peterston School is in the first wave of this roll-out; implementation to all schools is expected to be complete by the end of 2010.

Leading the way at Peterston

At the helm of this change from manual to electronic procurement at Peterston, is Deborah Griffiths, School Administrator. Having worked at the school since 2008, Deborah has been making her selection from paper catalogues, and faxing or phoning orders through. A periodical CDROM provided new pricing arrangements to upload to the SIMS financial management system (FMS).

Now Deborah has access to the eTrading for Schools portal, ordering has taken on a new simplicity. She can now access a series of online catalogues from



Deborah Griffiths

national and regional suppliers – these include her regular suppliers as well as framework contracts. In addition the Request for Quotation (RFQ) function provides the facility to contact suppliers for prices on complex items and services or those not readily available through catalogues.

In December Deborah completed two orders – one for stationery and the other for Christmas consumables, totalling just over £330. How did she find the process? *"I found it very user friendly. It was just like using any of the online shopping sites, like Argos. I just looked up the items that I wanted by entering the catalogue number or searching by key words."* In particular Deborah liked the fact that she no longer has to select from a catalogue and is anticipating much more storage space in the cupboard of her small office in the reception area of the school: *"My catalogue storage cupboard could become a thing of the past!"*

First orders came through quickly and this has provided the school with its first key benefit. Before, Deborah found that each order was bringing additional work: where prices had changed since the last CDROM update, each invoice had to be matched with purchase orders and manual adjustments made to their FMS. Not only was this a laborious task, it sometimes led to inadvertent budget over-spends where prices had risen. Now Deborah can forecast to the penny: *"Prices on the invoices are exactly as per the system. Even the VAT is correct. I don't have to do any manual adjustment which is usually so time-consuming."*

What about implementation – was this a complicated process? Lesley Matthews visited the school and implemented eTrading for Schools. The process (including the training) took about an hour and a half. Deborah was impressed by the security measures put in place with user names and passwords. She now has an icon on her desktop that takes her straight to the eTrading for Schools portal.

Lesley stayed with Deborah and talked her through her first order: *“The configuration and user guide documentation is ‘user-friendly’ with screen shots making it a working reference document. There was no need for us to re-invent them to suit Vale users”*. The xchangewales team is now working on an aide-memoire to support users further.

Learning the ropes

Generally a time of low order volumes, the lead up to Christmas has been a good time for the implementation. Being able to work through the functionality at a pace to suit her learning has been beneficial. Deborah says: *“I haven’t had to rush and have had time to get used to the system and all the things that it’s able to do. I’ve placed my first large order – over £1 200 - with one of our regular suppliers. Notoriously slow at processing orders, I’m looking forward to finding out how eTrading for Schools speeds this up.”* Deborah received the majority of her order in just two days – a much improved situation.

As is to be expected with a new system, there have been one or two niggles: Suppliers who do not describe their primary activities accurately, for example and an RFQ for printer consumables returned no takers. Investigations showed the latter to be partly due to an error in the school’s email address. A phone call to the eTrading for Schools helpdesk fixed this quickly. Deborah has also had to remind herself to link the eTrading for Schools order with the SIMS FMS. This is a simple function key press and a question of learning a new process – something that will soon become second nature.



Catalogues could become a thing of the past

So what’s next for eTrading for Schools at the Peterston primary school?

Deborah is keen to take advantage of the potential savings available through framework agreements. For example, the additional 7% discount from The Consortium for Purchasing and Distribution has already reaped benefits. This was achieved by registering with the supplier in advance of placing an order – a short form that was quickly filled out.

The new term in January will be a busy time for the school, and the list of requested consumables posted in the staff room will be getting longer. Deborah is now looking forward to the prospect of the savings in time and money that the eTrading for Schools system will bring.

We’ll be returning to the Peterston Church in Wales Primary School following them through their eTrading for Schools journey.

For further information please visit our website:

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