

CASE STUDY: ST MARGARET CLITHEROW CATHOLIC PRIMARY SCHOOL, BRACKNELL

Mireille Lovejoy, Chair at St Margaret Clitherow Catholic Primary School in Bracknell describes her leadership approach to deploying Governors' Virtual Office.

'Myself and a few of the other governors come from a "techie" background and we came to realise that the amount of paper that we were getting through in terms of governor meeting minutes and all the routine things we needed to see to and check was just getting bigger and bigger.

'The biggest challenge came when we looked at our policies. We were completely astray in terms of our document management. So when we received some marketing information on the Governors' Virtual Office we thought, this sounds interesting.



Gradual implementation

'We took a staggered approach to implementing the GVO. As a first step it was the running of the meetings. That was the first piece that we transferred across. We had to have a transition

period; there were some very established governors who'd been serving for more than 20 years, so moving straight to a completely paperless system would have been quite a shock. So we scheduled a year to completely transfer over.

'We started with running our meetings and posted preparatory materials using the GVO and that was a terrific success. The next piece we had real success with was the discussion zone. We'd never had that before, so that was quite nice. People could already see the benefits of having both of those pieces in place.

'Then it was only fairly recently that we managed to get all the policies across. GVO is simply a tool and you do need to know your documentation and have some document management in place. It's not going to come in and solve all your problems for you but it will facilitate the process.

'Now we're on the other side of the implementation and it's absolutely helping us to keep everything in order. For example, on the policy side of things, GVO automatically alerts us to the fact that "these policies are up for review in the next 4 weeks". It's also great to have the weekly reminders which GVO offers of what's coming up and needs to be done. We've become a lot leaner and a lot more efficient right through all the different tasks.

Secure data

'The other thing we have is that security which GVO provides, which the previous system did not. When we send emails we don't have to add

attachments, but literally point to where the relevant document is stored on the GVO. It's nice to know that when we circulate a confidential document it's literally sitting on the secure GVO.

Leadership challenge

'Before implementing GVO we took about six months to evaluate the system and took the opportunity to talk to people already using the tool. We attended a demonstration and asked the critical questions. We then sat down and thought as with all things it's good to put something in place at the beginning of the academic year, so we started our staggered implementation in the autumn term of 2012.

The ability to use the GVO has just made our clerk's life so much easier

'We said that although we'll start from November onwards, we will make allowances, so at meetings we always made sure there was a small selection of hard copies of papers available for people to refer to and through the year we slowly put them away.

'We also took advantage of some training that was put on to learn about additional functionality. Lastly we identified a governor whose responsibility was the GVO. Specifically someone who wasn't me, but a friendly face who could be contacted and say how to do x, y or z. Even now there are those who are very experienced on the GVO but others that aren't quite as confident. But as we use it the more familiar we are with the tool. You have to allow for the different skill sets on governing boards and give people the freedom to use it at their own pace.

De-risking governance

'Absolutely we're pleased with GVO. Anyone who is coming from a document management kind of background, anyone who has to know they're using the right version of a document, realised that having people chase round for the most up to date paper version or master copy of a document was really putting us at risk.

'With the advent of inspections with very little notice we just wanted a one stop shop: this is where we keep everything. It's in the one place and we don't need to worry about copies. Now I go to meetings with just a small notebook to jot down a few thoughts and ideas now. I used to have A4 folders strewn throughout the house. It really has transformed the way we work as a governing body.

'We're due an inspection currently. We've put a few other measures in place - like altering the committee structure. Yet the fact we've now established the GVO, that's one less thing to worry about. When that phone call does eventually come we know we don't have to have a mad scramble. We can go straight to the folder on the GVO and everything the inspectors need is there.

'It's helped us on lots of different levels. We're leaner, our meetings are much shorter. They're much more structured as well because people can see what needs to be discussed and what will be discussed. It also helps us plan as well because previously we had to pull out the old school diary. Now the GVO calendar quite clearly points to what's happening so that helps us with our planning.

Savings

'In addition, I certainly do believe we will make a saving on the clerking side. The ability to use the GVO has just made our clerk's life so much easier. She doesn't have to be in the school,

running off multiple copies of paperwork, she's no longer up to her eyes putting things in the post.

'There are real savings to be made to clerking efficiencies. The clerking role really is becoming so important to governing boards going forward that this is such a useful tool to have in place.

Beyond expectations

'Introducing the GVO was one of our objectives as a governing body – for governors to learn the tool and use the tool and become familiar with it over a period of time. And I think all the governors really valued setting an objective for themselves. It was nice to have an opportunity to say we are going to become more efficient as a governing body; and if you become more efficient you support the school better.

Sometimes by helping ourselves you can be in a better position to support the school.

'We've reaped more benefits than I think we were expecting and we're very much in support of using it. It might sound like it's a lot of work to go from a full paper system to a paperless system, but in reality it isn't, though you do need to have a plan in place. Do the quick wins first such as the meetings and the discussion zone and then you will build on that and get other functionality. If you break it down into pieces you can quite easily transfer between systems.

'We are a great advocate for the product and we do consider it a huge success. I'd encourage all other governing boards to take a look at it and see what it can do.'