

When to mail schools: 2009

Plus information on changes to buying patterns in schools

Contents

- 1 **The “when to mail” chart 2009**
- 2 **The change in responsibilities**
- 3 **The effects of Schools Financial Management Standard**
- 4 **The end of E-learning credits**
- 5 **The Standard School Year**
- 6 **Admin control of mail received in the holiday & Royal Mail’s action**
- 7 **Shared mailings – reforming the system**
- 8 **Helping schools find suppliers**
- 9 **The email alternative**
- 10 **School dates and shared mailing dates**

Opening note

In what follows, unless otherwise stated, I am referring throughout to schools in England. Education in the UK is administered separately by the DfCSF (for England), the Welsh Assembly, the Scottish Parliament and the N. Ireland Assembly. The DfCSF (previously the DfES and before that the DES) has control over about 90% of the UK, and thus, even though the rest of the UK has chosen to go down different routes, the DfCSF decisions and those of the local authorities in England impact on the massive majority of the UK.

The changes cited here often do not directly impinge on private schools, but many do follow state school guidelines and approaches.

1. The “when to mail” chart 2009

In 2007 there was a government u-turn, the result of which was that money which had been removed from schools (because it had not been spent in previous years) was handed back. Schools had to spend it between November 2007 and April 2008. From April 2008 the situation has been clear – 95% (approx) of the money in the school must be spent unless special dispensation is gained.

In August 2008 E-learning credits came to an end, and anything not spent by then was lost.

As a result schools have moved from two financial dates a year (April for general funds and August for E-learning credits) with money being carried forward, to one end-of-year date (April) and virtually no carry-forward.

By November 2008 it had become clear that many schools had been very cautious about spending money in 2008/9, ensuring that all the E-learning credits were spent by August, but then holding back on other spending, knowing that there was nothing in reserve. In other words, this year's money was held back in case something untoward happened anytime in the year.

The result of this is that January to April ought to be a time of big spending by the schools.

In terms of holidays, the majority of English schools have moved across to the new year planner (the Standard School Year) and, although there was a chaotic Easter in 2008 with some SSY schools reverting back to the old style calendar when they should not have done, hopefully that was the last kick of the old regime. With a more conventional Easter date in 2009, SSY should be the order of the day.

Here's the 2009 review:

January 2009 – we believe that it is worth mailing schools from 5 January onwards. Most schools will be open, at the very least for a pre-term INSET day if not for teaching. January response rates are often very good indeed and this year, with extra money available because it wasn't spent earlier in the year, there should be solid expenditure. The level of marketing into schools dropped dramatically in the autumn of 2008, and if that low level of marketing continues, then there will be good sales to be made. A number of companies in 2008 tried to make generic email marketing their main form of promotion into schools and found that although they could get sales, they could not run a business based on that level of response. If they now conclude that the school market is dead, then again those who make broader decisions about their marketing are likely to get very good returns.

February – we suspect the January response rates will continue into February because of the need to use up money this year, but avoid mailing in the week before half term (16-20 February) as in some schools mail will not be delivered by Royal Mail who are now returning some mail when they deem the school "closed". (See section 6 for more details) Even when delivered, mail arriving during half term gets a much lower response rate. Otherwise this is the month to advertise items which aim to get sales before the end of the school year. The lists that can work during half term are the emailings to teachers' personal addresses (opt-in and subscriber lists).

March – this year there is a fairly unified Easter break, with SSY schools finishing on April 3. So this should be an excellent month to pick up sales where schools are trying to use up their money.

April – Most schools will take a holiday either side of the Good Friday /

Easter Monday weekend, so the chaotic situation of 2008 where various schools were on holiday over a 5 week period will not recur. The new financial year will start April 5, and there is likely to be a delay before money starts being spent again. But schools don't return until the last week of April, so most of the downtime is also the holiday. However, as with all holiday periods, see note 2 below about school administration and the growth in its work. It is also worth noting that in 2008 for the first time companies were emailing teachers at their personal address right up to the last minute – and with some success.

May – traditionally May has been an average month for response rates, but the new system of finances may well improve the response to mailings at this time. Avoid mailing at the end of the 3rd week of May as the mail will arrive in the SSY holiday which commences on the Bank Holiday Monday. Rather, mail during that week for delivery in the following week. Certainly by May senior managers will have their money allocated and be able to spend.

June – normally an excellent month as many teachers have reduced timetables because of pupils taking exams and school trips. Teachers will often place orders for items that they want delivered at the start of September. Scottish and N Ireland schools finish at the end of June.

July – it is possible to have some significant success in the first week of July – although not for private schools. In general, mail in early July only when you are looking to achieve the placement of last minute orders for delivery next term. Term ends mid-July in England and Wales, although it should be possible to continue to email teachers direct through the summer. Again see my note about emailing teachers at their personal address. This does not have the restrictions that apply elsewhere.

August – in general we do not recommend mailing English and Welsh schools in August, and the success that we previously had with late August mailings has faded away. There are, however, some exceptions. First, with more and more work (timetabling, exam arrangements, school visits, etc) moving across to the school office, administrators and bursars are worth mailing as they are still in school. Secondly, it is worth doing mailings to coincide with the release of A level and to a lesser extent GCSE results. Thirdly, Scottish and Irish schools return in August and yet receive very little mail then. They are certainly worth mailing.

September – for the last two years the first week of term has caused difficulty for some but has been ok for others. Schools in England and Wales can start at any time between September 1 and 5, and as a compromise we suggest mailing at the end of this week to reach schools during their second week - unless you feel sure you will benefit from being in the school at the start of the term. In 2008 one mailing house was telling people to mail schools right at the start of September, as "if you don't get a sale then, you've lost it for the year." This is twaddle, and it's really rather sad that

such misinformation is still being put out.

In 2008 we had the summer audit in place for the first time, and it caused some disruption in September, but we suspect that was teething troubles, and most schools will do the summer audit when they should do it – in August. (It was the new Financial Management Standard which requires 6 month audit. Some administrators and bursars issued notices saying “don’t buy in September” so that they could audit then.)

October – with September being poor in recent years October has been much better for response rates. Avoid mailing so that the material hits schools during the autumn half term. Instead mail early in the month, or towards the end of that week for arrival the following week.

November – normally a reasonable month for promotions – teachers are well established with the classes they took over in September and able to consider new materials required for these particular pupils for use perhaps from January onwards.

December – avoid mailing primary schools after the first week of December, and avoid mailings to secondary after the second week. The idea of mailing straight after Christmas, to have the mail in the school for the start of the new term appears attractive but has not produced particularly brilliant results in our research. It can work, but is not an automatic goldmine. What did work for the first time in 2008 was emailing to the teacher’s personal email address right until the end of term – that could be worth doing again.

2. The changes in responsibilities

Starting around 2005 schools began to change the way in which their administration systems worked, largely under the influence of training done by the National College for School Leadership and the School of Educational Administration.

As a result a huge array of work previously undertaken by heads, deputies and senior managers moved into administration. Timetabling, organizing supply teachers, health and safety, staff induction, building and site contracts and maintenance, liaison with parents... These and many other tasks now reside entirely with the school administrators, whose position in the school has started to change.

The implication for sales is dramatic. Administrators get very little promotional mail (because most companies have not caught up with this development) and they are there all the time (including school holidays). There are email and mailing lists for them – they are easy to reach. (In one promotion in 2008 a document about the school’s central computer operating

system was sent to various parties by email. The school admin promotion was opened four times more often, when compared to other promotions.)

3. Schools Financial Management Standard: a historical review.

“The expectation is that all secondary schools should meet the Financial Management Standards in Schools by March 2007.” That little sentence which appeared on the government website sent shivers down the spines of managers and administrators in local authority schools throughout England, because it meant that for the first time ever the DfCSF was trying to lay down a set of controls as to how schools run their finances. Most schools have followed the standard to some degree or other, but the changes we have seen have not been as big as we might have expected.

Why the government felt it had to act: the background to the changes.

In the dim and distant, local authority schools were given money by the DES (forerunner of the DfES and DfCSF) and collected money from the rates. They gave some of this money to schools, but kept a lot of it for themselves and controlled matters centrally.

In short, until Thatcher the authorities could decide how much to give, how much to hold back and what additional support they wanted to offer. But gradually from the time of Thatcher onwards, more and more of the money was given to schools, until they had control of almost all of it.

But, as a result of this decentralisation, four problems were seen to arise. Firstly, there were schools with huge deficits and virtually no chance of ever recovering from this self-inflicted disaster. Worse, some of the schools with the biggest deficits were run by super-heads – the teachers who had been drafted in by the government to help failing schools recover. Recover they did, but in some cases the result was financial incompetence and/or malpractice. The government had the embarrassing task of watching as some of its star turns were removed from post just months after getting a knighthood or similar recognition for turning around a highly problematic low achieving school.

Secondly, there were a small number of high profile cases in which managers were found removing money from the school for their own purposes. Even more embarrassing, in virtually every case it was found that Ofsted (the privatised inspectorate arm of the government) had inspected the school while the fraud was going on and given the school a clean bill of health in terms of its office procedures and financial competence. (Ludicrously Ofsted then inspected itself and reported that it was doing an excellent job!)

Thirdly, more and more of the schools that were not in debt were found to be hoarding money – building up huge reserves for no particular purpose except perhaps to pay for supply teachers during a flu pandemic. Such schools were in fact clearly short-changing their children by not spending money raised in taxes and given over for education for spending that year. Although, to be fair, a lot of the heads really did feel they had a good reason to hold money back: their experience in 2003 – our fourth point.

In 2003, in a very public central government v local government fight, ministers accused local authorities of stealing money that was intended for schools. This followed protests from school managers that they had no funds and were now laying-off staff – which they did in huge numbers.

The national government, following very public statements by the prime minister that its interests were “education, education, education” (itself a misquote from Othello – just in case you are interested) said the state had put more money into education than ever before and there was no reason why any teacher should be laid off.

In a fit of pique the government called in the audit commission, but even before they reported in July 2004 it was clear that the missing money had arrived in schools. By April 2004 the Times Educational Supplement was boasting that it was producing the biggest weekly newspaper ever in Europe, as it ran 1000 page editions packed with job adverts. Many of those who had been made redundant were now able to re-apply for their jobs - and keep their redundancy payments.

What the audit commission found was that the national government was quite wrong – the local authorities had not stolen the cash, but rather it had been tied up in a national administrative system so complex that no one knew where the money was. While the government had allocated the money in April 2003, it took until January 2004 for many schools even to know how much money they were going to get. Hence the redundancies and resultant chaos.

The changes introduced as a result of the 2003 crisis.

The DfES then introduced four changes:

- a) The 3 year budget plan for schools, so heads would know how much they had each year, at least 2 years in advance.
- b) The claw-back facility, so that any school which retained more than a small percentage of its income (currently set at between 5% and 8% depending on the type of school) would lose it back to the local authority, unless it could give clear reasons for holding that money (e.g., in order to build a new science lab for which money was needed over a two or three year period).

- c) The School Financial Management Standard which tried to set up a series of basic rules that all schools have to follow (such as setting open and transparent budgets).
- d) The rule that local authorities must pay out everything in one go at the start of each year and not define any of the education budget as “unallocated” at the start of the year – which has been common practice. (2006/7 was designated an intermediate year allowing for adjustments to be made before the full introduction in April 2007 – although following a totally chaotic introduction of the scheme it was then removed in November 2007 and reintroduced in April 2008).

At the same time a series of programmes was introduced to try to get schools to get the best value for money and to make huge savings (often quoted at £2 billion) through block buying.

What all this means is that slowly but surely managers, administrators and heads of department in schools in England know much more about how much money they have. They know they will get it at the start of the financial year and how much there is likely to be next year. They know they have to spend it by the end of the year or they will lose it back to the authority who will give it to another school.

See <http://www.teachernet.gov.uk/management/schoolfunding/> for more on these topics in relation to funding until 2011.

As a result of these changes, purchasing by schools has begun to change, and the changes are gathering momentum.

4. E-learning credits

These were available to schools in England to spend on digital equipment related to the National Curriculum. They ran August to August each year, and came to an end in August 2008. Schools have become so used to them that there will be an inevitable period of adjustment through 2009 to how to live without them.

5. SSY

The changes mentioned in part one have given us a significant move towards conformity in schools as they are all brought under the same system of financial controls. Simultaneously, growing numbers of schools in England and Wales (but not Scotland and N Ireland) have moved over to the Standard School Year (previously known as the 6 term year)

What this means is that, whereas in the past schools in different parts of the country (and even within the same local authority) could have holidays that were quite different from each other, more and more schools started to

coincide their holidays.

This had a significant impact on the effectiveness of various promotions to schools: in the past it was often worth mailing schools in a holiday period (particularly half term) as quite a few schools would not be on holiday. Now that is less productive because almost all the local authority schools in England will be on holiday at the same time. What's more, as we shall see, teachers have changed the way they treat holidays, especially half term holidays, and again this has meant a reduction in the effectiveness of mailings which reach schools during half terms.

6. Admin control of mail received in the holiday

The past 10 years have seen a significant change in the role of administration in schools, as administrators have taken on more and more responsibilities. As the Deputy Heads have lost control over finances, so the Bursar's department (what we used to call the school office) has grown and grown.

In 2003, as the government set out its aim to have a qualified bursar in every school, the DfES began to fund a series of bursar training courses at the National College for School Leadership. Then the School of Educational Administration was funded by the DTI to provide training for the administrators working for the bursars. Suddenly the school secretary was no longer a mum working part-time, but a trained and qualified professional with a proper job title.

Two events occurred in 2007/8 which affect the way mail is handled by schools. First, Royal Mail introduced Keep Safe – a system through which they do not deliver mail to schools when the school is shut but will return it to the sender. (The situation is complex but the core of the situation, however, is that you cannot guarantee that mail sent to schools during the holiday will be left until staff return after the holiday. Where there is only a single administrator in a school this might lead to Royal Mail seeing the school as "shut" and thus having the mail returned. Email addressed to the teacher by name is a way around this of course.)

Secondly, the SEA began its campaign to build email lists of teachers, so that as much advertising as possible could go direct to the teachers, rather than coming via the admin staff. This campaign is continuing (Hamilton House as a partner of the SEA is involved in developing this campaign, and we can let you know how many mailing lists are available) and it is not only changing the way in which teachers are mailed, but also changing the opportunity for mailing in the holidays.

One particularly interesting point is that prior to the summer holiday 2008 the SEA emailed the 2500 administrators who have opted to receive its regular email information and asked if there was a demand for news during the summer. The result was a resounding yes, and for the first time the SEA

continued with its news and advertising service through much of July and August.

7. Shared mailings – reforming the system

Shared mailings started in 1978, when two companies simultaneously began running the system. The service – which involves a number of items from different companies being mailed together in one pack – has continued ever since, and there are now a number of firms offering this service.

There are different ways of encouraging administrators to open shared mailing packs, and each mailing house will offer its own solution. What Hamilton House has done is arrange to print the weekly newsletter of the School of Educational Administration as the cover page of all its shared mailing packs, bringing news and information to administrators.

As a way of encouraging administrators to open the pack and pass the information on, this is highly effective since the SEA Newsletter is just about the only publication aimed at school administrators. It carries news of the government's reform of educational administration and of the training courses that are run for administrators.

In 2009 Hamilton House is offering to mail an additional 10% of schools free of charge with each shared mailing, and send out an email advertisement also free of charge, along with each shared mailing. Please call for details.

8. Helping schools find suppliers

All companies that use Hamilton House for a solo or shared mailing are given a listing on the School Procurement Web Site, www.top5.org.uk. Other firms that are not clients of Hamilton House can buy onto the site for a modest fee.

The School Procurement Site is advertised regularly through the use of teachers' own email lists and on websites such as www.schools.co.uk

9. The email alternative

Emailing schools (that is sending an email to the general school address which normally begins admin@ or office@) commenced in 2006.

In 2007 the emailing of teachers directly (rather than via the school office) was introduced and in 2007/8 that service was extended to cover many other teachers (heads, heads of careers, SENCOs, etc).

Emails to schools are largely uncontrolled – you can buy the list yourself, and can create the advert in any way you wish. You will reach every school in the UK, but response rates may be modest.

Emailing teachers is much more effective, but of course you don't reach every teacher simply because not every teacher opts in to such lists. The lists are not available for rent or purchase – you can only have your advertisement sent out by the list owner.

Response rates for emails to teachers are generally much higher than for emails sent to school addresses.

You can see a list of the different teachers that are now being reached by this service and also the total number of teachers in each group along with the prices at <http://www.yesmail.org.uk/Schools.html>

10. Educational Blogs

This is the latest area of development and expansion – blogs reflecting the interest of teachers. In 2008 a series of experiments relating to blogs were set up. One appeared at www.blog.schools.co.uk and another at www.blog.admin.org.uk (for administrators).

Different formats have been tried. The schools blog reported on issues in a middle-of-the-road way for a while with modest results, but when a stronger line was taken, with the blog having an opinion, monthly readership rates doubled. The Admin blog started off dealing with administrative matters, but when it in turn moved over to the writing of a diary of an administrator, readership shot up until around one third of all the schools in the UK were reading the blog at least once a month.

A number of other blogs have been developed outside of the educational area, one gaining over 60,000 readers a month. If you would like to know more about blogs and how they can be used, please do call 01536 399 000. Our guess is that in 2009 blogs in education will become major players in the marketing mix.

For more information on any topic please call 01536 399 000.

