

Oracle transition for schools Update, Questions and Answers

Update

In these updates following the announcement of the recommendations going to cabinet, we will try to ensure that you are clear about how you can expect to hear from us and what the plan is for communication, engagement and support over the next few weeks and going forward.

This week the DfE Buying for Schools Team have met some School Business Managers at the BASBM conference to start to outline how they can support schools with the procurement process. If your school missed out on this event, and wants to join a thriving community and resource which has over ¾ of Birmingham schools as members, then please see their website at the link below for more information:

[Birmingham Association of School Business Management - Welcome \(basbm.org\)](https://www.basbm.org)

This document has the following updates for you, whilst leaving previously published information available for your reference:

1. A new Q&A section covering questions received following Sue's webinar, via email or through consortia visits. Not all questions received have been answered yet, and we are working hard to ensure that all questions received get an official response by next week's update. *Please note the old Q&A document, published prior to the announcement has been archived and can be found here:*
[Archived Oracle Transition QA - pre September 2024 | Birmingham City Council](#)
2. Details of the finance update, now a separate section in Schools' Noticeboard, containing information about 23-4 Year-end balances and 3-year forecast timelines.

Key messages from Sue Harrison's webinar on Tuesday 24th September: The webinar recording and slides can be found at the link below, which covers:

How we developed the business case

The options we considered

The recommendation and rationale

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[Link to webinar recording and slides](#)

The recommendation

It is proposed that BCC will cease to offer HR, Payroll and Pensions as a traded service, instead retaining some staff to provide an audit and compliance function in line with its statutory duties.

Schools will be directed to the commercial market to procure a service, likely managed HR and Payroll, which meets their needs.

BCC has conducted market research and engaged with suppliers.

We can share the findings of our research, and we are confident there are trusted and appropriate suppliers able to take on schools.

BCC will support the transition of schools to their new service by working with schools and providers to manage a programme of offboarding.

BCC will review and adjust charges for Schools Financial Services to ensure that it is able to reach a break-even position each year.

If schools opt out of the new SLAs, BCC will cease to offer Schools Financial Services.

What this means for schools

The decision will be taken at Cabinet on the 15th of October.

There will be a requirement for all schools to become chequebook schools - we are working with Barclays bank and some schools to begin this process.

Schools will need to find a payroll and HR provider that suits them. We will support them with this process alongside the Department for Education Buying for Schools team.

Link: [How DfE Get help buying for schools can support you - Birmingham schools Tickets, Tue 22 Oct 2024 at 14:00 | Eventbrite](#)

Finance Update

Please note that finance now have their own section in Schools' Noticeboard. This week this contains:

Useful information around Schools' Year-end balances 2023-4, which are being published today.

A change to the 3-year financial forecast deadline and the rationale.

Finally, with the need for all schools to now move to full chequebook status (please note the webinar on Wednesday 9th October – link above), we are leaving the notes and documents below for your reference.

Becoming a chequebook school

We are now aware that it is proposed that all schools become chequebook schools as part of the Oracle Transition. The first cohort of 24 schools is due to convert on 1st November we would like to reinforce that we are committed to supporting all schools to make this change, and as such, have developed several documents to support schools with conversion. These can be found in the link below:

[*Support and guidance for schools converting to chequebook status*](#)

These include:

Full preparation document on conversion to chequebook status

Summary document

A briefing note for governors and/or school staff

A slide deck for governors and/or school staff

New updated operational guidance for schools transitioning to

chequebook status released on 12th September. This includes

information to answer 7(f) 12() TJETQq0.000008869 0 595.2 841.92 reW*nBT/F3

Questions and answers since the announcement



How will BCC procurement support this process? Will they work alongside or separate from DfE?

Will information migrate over through support from BCC or will this be the schools responsibility to start all of this fresh with a new provider?

We will be working alongside the DfE to make sure all schools are supported through this process.

BCC will support the transition of schools to their new service by working with schools and providers to manage a programme of offboarding. We will help make sure you have all the policies, data and

We need to know exactly what services we need to procure? A table, or similar, showing all this would be really useful.

within the full business case which you will have access to when it is published. We will need to explore how the services are best provided. There will need to be a period of business change to make sure we can operate effectively in a new way, and we will be seeking input from teams and schools on how this will be best achieved.

Will there be an Employee Relations service?

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| <p>How much time and money will BCC have to spend auditing an unknown number of private providers for compliance? Will there be capacity in the new audit team?</p> | <p>BCC has conducted work to assess which functions we currently perform are statutory, this is presented within the full business case. We will need to explore how the services are best provided. There will need to be a period of business change to make sure we can operate effectively in a new way, and we will be seeking input from teams and schools on how this will be best achieved.</p> |
| <p>HR submit the workforce pension on our behalf - who will do this in future?</p> | <p>The new payroll provider for the school will be required to submit the pension details in the required format to the BCC pensions team each month by the specified date. The BCC team will then collate and pass to the pension agencies. The employee and employer contributions will also need to be submitted to BCC to pay over on your behalf</p> |

How do the WMPF pension payments work from new payroll providers? Will the team for pensions still be contactable? What is the mechanism for issues, especially if the new

have applied already but heard nothing.

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| | for a recommendation which cost either schools or BCC more money. |
| Are any other sectors of the council affected in the same way as schools? | There is no part of BCC that is not undergoing significant scrutiny. The council faces exceptional challenges that we must address to deliver the services that our citizens need, expect, and deserve. As mandated by government intervention, the council has developed an Improvement and Recovery Plan (IRP) |
| It seems that this will force some schools to consider academisation? Is this the aim? | No, this is not the aim. |
| What happens if Cabinet do not agree the recommendation? | If Cabinet do not agree with the recommendation in the business case, then we will be directed to look again at all the options. This would put us in a tricky position because we believe there has been a full and thorough examination of all the viable options, and we are working to a tight timeline to help ensure schools have an alternative solution in time for the September 2025 deadline. |
| The decision has already been delegated to Sue Harrison, isn't this just a rubber stamp exercise? | There are a number of reasons for us to take the full business case to Cabinet: <ul style="list-style-type: none"> - It is right and proper that there is scrutiny of such a big decision. - Sue Harrison and Cllr Brown were given the delegated authority to explore the options. On further advice from the governance teams this doesn't include the delegation to make the decision. |
| Theme 5: Some schools are more affected than others by this announcement, in terms of their chequebook status, the range of BCC services they use or the staffing capacity in school. How will BCC prioritise support to where it is needed most? | |
| These new responsibilities for schools mean additional work for SBMs, HTs and admin teams. What support and remuneration will be considered? | As an authority we want to fully understand the differing needs of all our maintained schools during this transition so that we can prioritise support where it is needed most. There will be a survey issued to schools, if the recommendation is accepted, to capture this information. |
| BCC need to fully understand the unique small primary / nursery school situation and support accordingly. Is academisation the only option for these settings? | The survey mentioned in the answer above is something that we hope will help us capture schools' unique circumstances. There will be a number of ways we can support schools depending on the needs identified. |
| We don't have a very long period of time to undertake this intensive piece of work, | We are confident that the transition can be completed in the timeframe given, despite it being at the end of this academic year. A range of |

today, such as the recording and slides from today, the governor packs and the links to various support webinars? Where can I find the Q&A document that highlights all the questions asked since the announcement?

to support webinars and governor packs etc, is the Oracle Transition Update and Q&A document linked through Schools' Noticeboard.

All questions since the announcement, received either during the webinar, by email or through forum/consortia visits form part of the weekly Oracle Transition Update and Q&A document linked through Schools' Noticeboard. Please note that all questions and answers from before the announcement on 24th September have now been archived and can also be accessed