

24th October 2024

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.

Last week Sue Harrison shared the information about the cabinet decision with schools, via Headteacher letter and Schools' Noticeboard. Within it there are 4 key actions for schools to take that will support them in ensuring the transition away from Oracle is as effective as possible. The key points from this communication are outlined below:

Cabinet have now discussed the business case and considered the options available. **Cabinet supported all the recommendations in the paper.** This means that:

- BCC will cease to offer HR, Payroll and Pensions as a traded service from September 2025, instead retaining some staff to provide an audit and compliance function in line with its statutory duties.
- BCC will review and adjust costs and charges for Schools Financial Services to ensure that it is able to reach a break-even position each year. If schools choose not to adopt the service, BCC will cease to offer Schools Financial Services.
- The Director of Children's Services and the Cabinet Lead Member for Children, Young People and Families, were given delegated powers to review the outcome of the Schools Financial Services redesign and revised charges within six months of this decision and take appropriate action to cease the service if it remains financially unviable.

We now have the clarity to move forwards with the agreed recommendation, and there are several actions for schools to take resulting from the decision.

1. **Please email FullCBSMailbox@birmingham.gov.uk to indicate your preferred date to transition to full chequebook status.** Currently there is the option to go on 1st January, 1st April or before 1st September 2025. All documents related to this are available in the Oracle Transition for Schools Update and Q&A document linked through Schools Noticeboard.



2. Please read the information about the DfE get help buying for schools team in the latest update and attend one of their webinars on either 22nd October at 2pm, or Wednesday 13th November at 1pm. Most importantly, **please complete the [Expression of Interest form](#)**. This does not lock you into any agreement, so please sign up now even if you are not 100% sure that this is the route that you will end up going down. The deadline to express your interest is 6th December 2024, with signed commitment needed before the Christmas holidays.
3. Please look out for and consider all 2025-6 SLAs for traded services, including the newly redesigned Schools' Financial Services SLA, arriving in mid-November and respond by the deadline given, sometime around the Christmas holidays. As soon as we have a clear indication of the number of schools that would like to continue with Schools Financial Services we will be able to finalise our review early in the new year.
4. Please could all schools **complete the [Oracle Transition for Schools Self-Assessment Survey](#)**. This will help us to evaluate individual schools progress and engagement so that we can ensure we support you according to your needs.

As ever, if you have any further questions or concerns, please contact via the usual email address oracleschoolsrelationship@birmingham.gov.uk.

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

1. A link to the recording of the Governor Drop-In on 15th October.
2. Proposed engagement and support activities as we start the new half-term.
3. The slides from the DfE webinars, questions and answers they have published and the link to the Expression of Interest form.
4. News on the proposed BCC Finance SBM network meetings – and confirmation of the first date.
5. A new section with links to key documents and recordings from previous updates.
6. Updates to the Q&A document following the Going Chequebook and DfE buying team webinars, and Schools and Governors Drop-Ins.

Governor Drop-In 15th October 2024

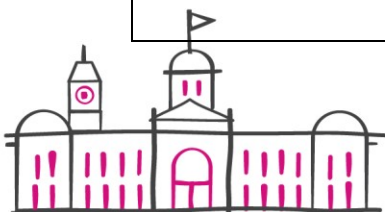
It was great to have over 80 Schools Governors attend this event and the recording can be found here: [Governor Drop-in webinar 15.10.24](#)



Support on offer (and some deadline reminders)

We will continue to communicate with you regularly, offering drop-in sessions, support webinars and Schools Noticeboard updates with Q&A. Chris Etheridge, Oracle School Relationships Manager, will be attending all Fora as appropriate, and can attend any Network or Consortia meetings as requested. The table below shows the engagement and support opportunities planned so far for next half-term, alongside some key deadlines for actions for schools:

Date	Support / Engagement activity / Key deadline
Friday 8 th November	6pm: Deadline for self-assessment survey completion. Oracle Transition for Schools Self-Assessment Survey
Tuesday 12 th November	BEP Conference Face-2-face Drop-In available all day with SRM
Wednesday 13 th November	1pm: DfE Buying for Schools team Webinar 3 How DfE Get help buying for schools can support you - Birmingham schools Tickets, Wed 13th November 24 at 13:00 Eventbrite
Thursday 14 th November	11am: NEW SBM network meeting (<i>More info below</i>) Microsoft Teams Need help? Join the meeting now Meeting ID: 317 657 182 434 Passcode: sRQwZS
Friday 15 th November	Expected date for 25-6 SLAs to be published, inc. redesigned Schools Financial Services proposal.
Wed 20 th November	10am: November HT/SBM MS Teams Drop-In Microsoft Teams Need help? Join the meeting now Meeting ID: 356 480 762 332 Passcode: 7MU25W
Friday 6 th December	6pm: Deadline for DfE Buying for Schools team Expression of Interest. Expression of Interest form
Tuesday 10 th December	10am: December HT/SBM MS Teams Drop-In Microsoft Teams Need help? Join the meeting now Meeting ID: 341 543 787 261 Passcode: hbVWSj



NEW BCC Finance Termly SBM Network meetings

As BCC finance continues to strengthen as it stabilises following the impact of Oracle, the Schools' finance team are planning to start termly Network meetings aimed at School Business Managers. These will ensure a two-way dialogue around important issues affecting schools and information and support coming from BCC. **The first meeting is on Thursday 14th November at 11am** and the link is in the table above. In this meeting there will be an introduction to the schools' finance team, information around end of year balances, moving to full chequebook status, the redesigned SFS SLA and how schools in deficit can be supported. There will also be a Q&A session and an opportunity to shape future meetings. For example, this first meeting will be for all maintained schools, but the proposal is to have separate meetings for both Special and maintained Nursery Schools going forward due to their differing funding and financial needs.

The DfE Buying for Schools Team

The DfE Schools Commercial Team leads on the delivery of services to support schools to buy non-staff goods and services more efficiently and to make effective use of the resources available to them.

Through the DfE's Get help buying for schools free and impartial procurement service we aim to support schools and trusts to buy goods and services compliantly and have peace of mind that they are getting good value in terms of cost, quality and time.

We know that buying for your school or trust can be a complex and resource intensive process and we're here to help. Our experienced procurement team work exclusively with the school sector and are on hand to support Birmingham schools that wish to be supported, through an aggregated procurement for their HR and Payroll services.

To read more about the service, you can visit the page below:

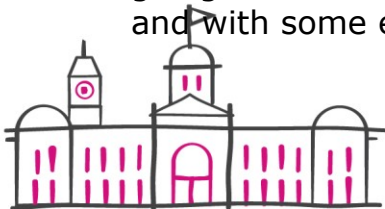
<https://gethelpbuyingforschools.campaign.gov.uk/>

So far, the DfE team have done two webinars for Birmingham schools (with another scheduled for Wednesday 13th November, link in table above) and have received over 60 expressions of interest. **A link to the slides from the webinars and a Q&A** published by the DfE following the first one can be found here:

[DfE Buying for Schools webinar presentation October 2024](#)

[DfE get help buying for schools Q&A](#)

Here is the [Expression of Interest form](#) for schools that would like to be supported in their procurement by DfE Get help buying for schools. Please note, this does not lock you into any agreement so please sign up now even if you are not 100% sure that this is the route that you will end up going down. This will help the team gauge the scale of the aggregation, and with some early market engagement.



The deadline is 6th December 2024. This will be a hard deadline and any school completing after this date will not be able to be included in the aggregation. The Buying for Schools team will then need to talk through next steps and have certain documentation sent back to them before the Christmas break, so the sooner you sign up the better.

Finance Update

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 questions that schools had around the process, such as bank accounts and deficit budgets.

Further to this, a webinar about the process of moving to chequebook status for interested schools took place on Wednesday 9th October. The recording and slides from this webinar can be found here: [Recordings and presentations from school](#) webinars. The financial delegation framework template, as promised to schools in the webinar can be found here: [Framework of financial delegation for governing bodies](#).

NEW Links to documents and recordings

An archive of key documents published in these updates since September 2024

Sue Harrison's webinar on Tuesday 24th September:

[Link to webinar recording and slides](#)

The link to the **Business Case outlining the recommendation made to cabinet:** [Decision Details: Alternative Solution for Schools HR, Payroll and Finance Business Case \(cmis.uk.com\)](#)

[BCC HR Services SLA 2024-25](#)

[BCC Payroll and pensions SLA 2024-25](#)

The **market research document from the options appraisal** which informed the business case: [Oracle for schools – market research](#).

A pack for you to use with governors around the recommendations that went to cabinet: [Governor pack Oracle for schools](#)

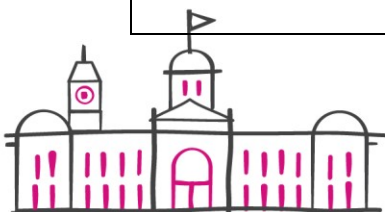


Questions and Answers

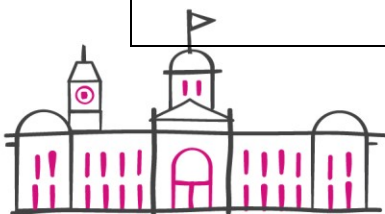
The questions have been put into 7 emerging broad themes, which in turn have been ordered by the number of questions received. Please note that some questions have been merged, or reworded slightly, to ensure that the response provided is as useful and concise as possible. Not all questions received have been answered yet, and we are working hard to ensure that all questions received get a response. **Any new questions since the last update have been added in purple for your ease of reference.**

If you have something new to ask, or need more information, please don't hesitate to contact oracleschoolsrelationship@birmingham.gov.uk and it will be added to this new document.

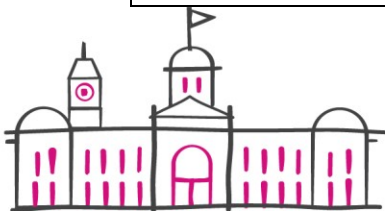
Question	Answer
Theme 1: What support will schools get from BCC around the procurement of new suppliers and the timely and smooth transition to them?	
Has the testing of the market considered the capacity of these new providers effectively?	One of our primary questions to all the providers who attended our early market engagement event was around capacity to take on new schools. We were reassured that there is capacity in the market for schools to move to a new provider. We will work with schools and suppliers to ensure that the transition process is smooth. This might involve moving batches of schools together at the same time or staggering them to avoid capacity issues.
Does this mean BCC is making recommendations on Providers? I am keen to get a list of providers that you have looked at and carried out your market research. Will this be available before the 15 th October decision date?	We won't be providing a list of recommended providers, but we will be sharing the findings of our market research. Working closely with the Department for Education Buying for Schools team means that schools can draw on all the experience that team has, including their approved framework for providers of HR and Payroll services if that suits schools' needs.
If you don't have a business manager, where does a Head start on looking for a payroll provider?	Signing up to the DfE Buying for Schools Team webinar on Thursday 10 th October at 2pm is a good starting point. The link can be found in the update earlier in this document.
Will there be any sort of specification we can use to find alternative providers ensuring we are meeting all of our obligations?	Using the current services in the current SLA you have would be a good place to start, but you know which services are most valuable to your school. The Department for Education Buying for Schools team are available to provide support on how to run a compliant



	procurement process, including what you might want to consider in a specification.
How many different HR providers do you anticipate being needed to meet the needs of so many schools so suddenly?	This fully depends on how schools choose to act. The number of providers is likely to be reduced if schools choose to take up the offer of support from Department for Education Buying for Schools team or decide to act together and leverage greater buying power. We are confident that there is capacity in the market for schools to move to a new provider.
If we secure a provider before the timeline outlined, will you release us from SLAs / existing structures?	We will be flexible with schools who want to leave the service outside of the normal six month notice period. We will work with schools and new suppliers to find a suitable timeline to ensure a smooth transition to the new provider.
Could you also confirm whether the 6-month notice period if we are leaving is being waived?	We will be flexible with schools who want to leave the service outside of the normal six month notice period. We will work with schools and new suppliers to find a suitable timeline to ensure a smooth transition to the new provider.
It has been suggested that the DfE procurement service does not have a local focus and can be expensive. Can you reassure us about this?	<p>The DfE 'Get help buying for schools' service includes a team of procurement specialists that can save you time and money by offering free support when you're buying any goods or services for your school.</p> <p>Their specialists can:</p> <ul style="list-style-type: none"> • offer advice and guidance to make sure you're buying compliantly at any point, even if your procurement process is already in progress • review your documents to make sure they're complete and compliant - this includes advice on specification documents, tender documents and evaluation criteria • support you on choosing or using a framework agreement for your procurement • advise when you need to seek legal advice <p>Their focus is on helping schools get the best value for money services. As Ben shared at the webinar, the team can support with access to local suppliers if that is something that is important to schools.</p>



<p>How will BCC procurement support this process? Will they work alongside or separate from DfE?</p>	<p>We will be working alongside the DfE to make sure all schools are supported through this process.</p>
<p>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?</p>	<p>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 information required to move to a new provider.</p>
<p>Will we get a step-by-step guide, informing us what we need to do, where to go to look for new suppliers, where to go for help, and the timescales?</p>	<p>The DfE Buying for Schools Team of procurement specialists can save you time and money by offering free support when you're buying any goods or services for your school. We will be working closely with them to ensure that schools needing the most support receive it following cabinet's decision. In the meantime, there is a webinar to find out more about them on Thursday 10th October at 2pm. The link can be found in the update earlier in this document.</p>
<p>When I moved one of my schools to an independent HR supplier, BCC made all the staff leavers and there were issues with pensions contributions. How will you make sure this doesn't happen?</p>	<p>We have spoken to some schools who have recently left BCC for alternative providers and are factoring in the lessons learned to the process to ensure that mistakes aren't made in the future. We want to support the transition of schools to their new service by working with schools and providers to manage a programme of offboarding.</p>
<p>When is the last payroll as it isn't clear July or August?</p>	<p>We will be running the project all the way through to September 2025, but we know many schools will want to make sure they are set up on their new payroll provider before the summer break. We will work with schools and new suppliers to find a suitable timeline to ensure a smooth transition to the new provider.</p>
<p>The joining together as a group of schools should be led by BCC. Otherwise, schools will all be going through the same processes independently.</p>	<p>There is no need for schools to act alone if they would like to be working with other schools. The Department for Education Buying for Schools team will be able to help schools act together and support schools throughout that process. If this is of interest to you then please attend one of their webinars. If schools or consortia are organising sessions with providers which they are happy to open up to</p>



	other schools, BCC is happy to help advertise these opportunities.
Do we need a new HMRC account when we are joining an external payroll provider? Does this generate a P45 for schools?	HR providers are well-established in setting up PAYE references as part of their on-boarding processes. This process does generate a P45 as the previous reference is 'left'. This is administrative only and this will be a vital element to communicate with staff effectively, as part of the off-boarding process, so that there is no undue worry or concern.
Slide 8 in the DfE buying for schools team webinar mentioned TUPE? Does this affect schools?	There are no jobs at risk in schools as part of this transition and TUPE does not apply to schools in any way. The DfE will be removing this phrase from future presentations to schools
Theme 2: What are the statutory duties BCC HR, finance, payroll and pensions will still perform and what other aspects are affected?	
What are the statutory duties that Birmingham will retain? We need to know exactly what services we need to procure? A table, or similar, showing all this would be really useful.	BCC has conducted work to assess which functions we currently perform are statutory, this is presented 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?	By ceasing to offer Schools HR services we will only be looking to continue activities that are required for us to deliver our statutory duties to schools. Only the statutory elements of Employee Relations Service will remain. There will be no traded service.
If ER is impacted, how does this work should you have to dismiss staff? Previously we have been told when using an independent HR provider that we had to use BCC for dismissal due to indemnity?	BCC will make sure that it is able to continue to meet all its statutory duties, such as dismissals. 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.
For schools undertaking restructuring and redundancies, how will this process be supported if HR/ER changes have to be made?	BCC will make sure that it is able to continue to meet all its statutory duties. We will need to explore how these services are best provided to make sure we can operate effectively, seeking input from



	teams and schools on how this will be best achieved.
Will BCC still be providing maintained schools access to policies? If BCC are not providing key HR policies, this means that each individual school would have to write their own, despite BCC being the employer? Also, only gold subscribers get access to these currently. Will this change going forward?	Yes, we will ensure that every school where BCC is the employer will have access to BCC policies. This will be all schools as Gold contract will not exist in the future.
Some Academy staff are still covered by the BCC policies through previous TUPE, so will academies still be able to access the HR policies? We are assuming that there would be a charge for this facility.	It would be the Academy's responsibility to ensure they have the correct information. However, they will have open access to all of BCC's policies.
How can we all have different HR providers with Equal Pay issues hanging over us all?	HR providers for schools where BCC is the employer should still be following BCC policies. BCC will maintain an oversight of the statutory duties to ensure that there is pay compliance and other statutory elements are being met. 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 we be able to request HR information on cases dating back to previous years when we were supported by the BCC?	It is the responsibility of each school to maintain an accurate personnel file for all employees. This is part of our current SLAs. Schools should be making sure they hold all current and historical data. Oracle will be switched off for schools in September 2025 and we are working with the Oracle programme to establish how the data will be appropriately archived.
How much time and money will BCC have to spend auditing an unknown number of private providers for compliance? Will there be	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



capacity in the new audit team?	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.
HR submit the workforce pension on our behalf - who will do this in future?	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
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 provider makes an error which only surfaces 5 years later?	As above. Any queries on data will be passed back to the payroll provider or the school to answer as it is their data. 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 the pension funds all now have to liaise with multiple providers, or will this work come into schools?	No, they will direct all queries via the BCC office, and they will liaise with the payroll provider/school.
What pension information will BCC require from the new providers?	BCC will work with the new payroll providers to ensure that all pension information is provided back to BCC appropriately. This may have different processes depending on the provider, but BCC will continue to submit pension payments to all schemes on your behalf.
How will the employee benefits scheme work for community schools if all are operating under different payroll providers? Will the 'employers offer' as it currently stands, remain?	BCC will continue to provide access to employee benefits to all its employees. The process for this with new payroll providers will be shared in due course.
Will School and Governor support still exist?	Yes, this project is only looking at Schools HR, Payroll and Pensions and Schools Financial Services as a result of the decision not to reimplement Oracle for schools. Any other support you receive from BCC outside of these services is unaffected by this project.
Will access to any other services outside of HR,	No, other services are not impacted.

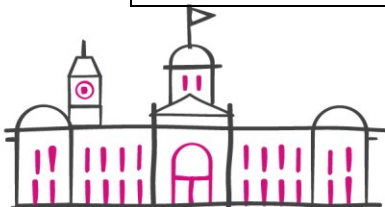


<p>payroll and pensions be impacted?</p>	
<p>Is the Workforce return to DfE still done by BCC?</p>	<p>The data required to undertake the Schools Workforce Census (SWFC) will be retained by the individual schools HR/Payroll provider. It will therefore be the responsibility of the school to either submit the SWFC or to make arrangements for their provider to submit to the DfE on their behalf. For schools where BCC remains the employer, an audit process will be undertaken to check that schools are complying with this statutory return.</p>
<p>Theme 3: It is important that we all fully understand the impact and processes around all schools going full chequebook.</p>	
<p>Do you still have to apply to become a cheque book school before December</p>	<p>All schools will be required to become full chequebook schools if the recommendation is agreed by cabinet. We would appreciate all schools letting us know when they would like to convert, so that we can phase this transition where possible. Please contact FullCBSMailbox@birmingham.gov.uk with this information. If we do not hear from your school before December, BCC finance will be contacting you.</p>
<p>When will we hear when we are to be going cheque book? We have applied already but heard nothing.</p>	<p>All schools that have sent a request to convert to full chequebook status at the email above should have had an acknowledgement email. Schools converting on 1st November 2024 have all been made aware and others that are converting on 1st January 2025 will hear from the team by Friday 15th November. Normally schools who declare intention to convert by December would convert in April, but we are asking schools to add their preferred date when applying as BCC will try to ensure schools can convert when it is convenient for them.</p>
<p>Is there any significant disadvantage to converting to full CBS after April 2025 if we feel in school that we need more time?</p>	<p>There is no disadvantage. BCC Finance are committed to making the process as easy as possible for schools to go at any date so that we can spread the schools across the rest of the academic year where possible. The reason why we are trying to stagger schools' conversions is to ensure that we fully support all schools to the same level.</p>
<p>Do Schools Financial Services have a Cheque Book support</p>	<p>There is a support available that can be accessed via emailing sfs@birmingham.gov.uk.</p>

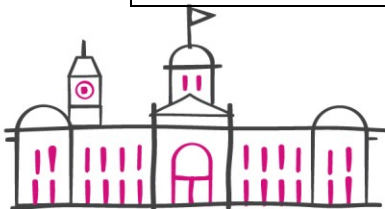




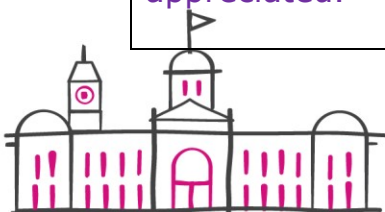
group in place to support schools through this transition?	There have also been several SBMs volunteer to be chequebook buddies and BCC finance will attempt to link schools together as required.
Do we only get support to move chequebook if we already buy SFS? What about the schools who do not buy into SFS?	All schools will be supported by BCC in transition to chequebook status regardless of their financial support provider. Following transition, SFS can still support your school if you sign up to their SLA.
Some schools have received lists of courses from other providers around converting to full chequebook status. All of which have charges. Will BCC provide the training required for the move to cheque book status free of charge?	Schools' Financial Services will support all schools through the transition to chequebook status, even if they don't subscribe to SFS. This support, and any training regarding the transition from both BCC and Barclays Bank, will be free of charge.
We need to know what happens if the school is in a deficit position. Can you still get a bank account and an overdraft?	Yes, you can get a bank account with Barclays, but schools with deficits will be contacted individually about their transition to ensure that BCC can support then accordingly.
What about schools in significant deficit positions, previously we have always been told if a chequebook school goes into deficit, then the school would lose their cheque book status.	This process would be managed on a school-by-school basis so that all schools in financial difficulty can get the support that they need. There will be no loss of chequebook status in the future as there will be no other financial status for schools.
Can we use our existing Barclays accounts?	Any existing Barclays current account can be converted and will be moved over to become the full chequebook account. There will be no change to sort code or account number.
Does Barclays offer BACS?	Not BACS as such, but it is basically the same, online banking with any payments made within 3 days.
Can chequebook schools make purchases using debit card, or will we have to use the current purchase cards? If the latter, how does that work?	If schools remain with Barclays then they will not get a debit card as our purchase card contract is with Natwest. Therefore, you will continue to use your Natwest purchase card if you have one. If not, application and contact details are in the documents provided for conversion.



Would we still use Dcal? and have our physical cards?	Yes, DCal will still be used with your existing cards. There is no change planned for this at present.
What happens to the school's carry forward?	Surplus carry forwards will be paid to schools to hold themselves.
Can you please advise what information you will provide to confirm the balances which will be brought forward upon transition to chequebook status and will there be guidance sent to schools with regards to the balance sheet figures at the conversion date to cheque book, to ensure accuracy.	Balances will be agreed and confirmed with individual schools before they transition in the same way that end of year balances are agreed at present.
How will internal recharges (invoices) work going forwards? For example Safety services, S&GS	You would pay for those services as you would any external supplier invoice. Your school would receive the invoice from the service directly for payment.
How will Special Schools process their OLA invoices to other Local Authorities?	They would have to raise an invoice to the other LA for payment as you would with any other payees.
We will need to be clear what Birmingham expect in relation to SFS / Audit so that we are clear on what our Governing Bodies / Finance Committees should be doing regarding terms of reference, financial delegation and systems of internal control upon transition to full chequebook status.	There has been an updated document linked through schools' noticeboard that can be found here: Framework of financial delegation for governing bodies Birmingham City Council
Theme 4: We would like to understand the process that has led to this decision better	
Will you share how the RAG ratings were decided?	Yes, all the information on the assessment of the options can be found in the full business case. As this is being discussed at Education, Children and Young People Overview and Scrutiny Committee on the 11 th October and Cabinet on 15 th October the paper will be published and available for you to read.



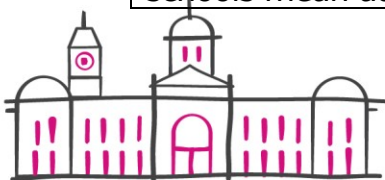
<p>Do you know for sure that this is going to save schools money?</p>	<p>When we explored all the options, this recommendation presented the best value for money for schools and BCC. We could not advocate for a recommendation which cost either schools or BCC more money.</p>
<p>Are any other sectors of the council affected in the same way as schools?</p>	<p>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)</p>
<p>It seems that this will force some schools to consider academisation? Is this the aim?</p>	<p>No, this is not the aim.</p>
<p>What happens if Cabinet do not agree the recommendation?</p>	<p>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.</p>
<p>The decision has already been delegated to Sue Harrison, isn't this just a rubber stamp exercise?</p>	<p>There are a number of reasons for us to take the full business case to Cabinet:</p> <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.
<p>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?</p>	
<p>Is there advice from BCC about what to do first? Some guidance about how best to approach the various aspects of this transition would be much appreciated.</p>	<p>On 17th October, Sue Harrison sent a letter to all schools affected, which outlined four suggested actions for schools which would support the process.</p> <p>1. Please email FullCBSMailbox@birmingham.gov.uk to indicate your preferred date to transition to full chequebook</p>



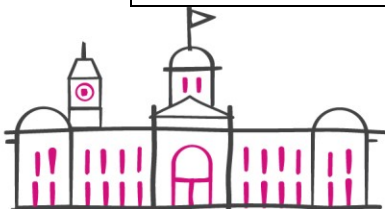
	<p>status. Currently there is the option to go on 1st January, 1st April or before 1st September 2025. All documents related to this are available in the Oracle Transition for Schools Update and Q&A document linked through Schools Noticeboard.</p> <p>2. Please read the information about the DfE get help buying for schools team in the latest update and attend one of their webinars on either 22nd October at 2pm, or Wednesday 13th November at 1pm. Most importantly, please complete the <u>Expression of Interest form</u>. This does not lock you into any agreement, so please sign up now even if you are not 100% sure that this is the route that you will end up going down. The deadline to express your interest is 6th December 2024, with signed commitment needed before the Christmas holidays.</p> <p>3. Please look out for and consider all 2025-6 SLAs for traded services, including the newly redesigned Schools' Financial Services SLA, arriving in mid-November and respond by the deadline given, sometime around the Christmas holidays. As soon as we have a clear indication of the number of schools that would like to continue with Schools Financial Services we will be able to finalise our review early in the new year.</p> <p>4. Please could all schools complete the <u>Oracle Transition for Schools Self-Assessment Survey</u>. This will help us to evaluate individual schools progress and engagement so that we can ensure we support you according to your needs. The deadline for this is Friday 8th November 2024</p>
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These new responsibilities for schools mean additional work

As an authority we want to fully understand the differing needs of all our maintained



<p>for SBMs, HTs and admin teams. What support and remuneration will be considered?</p>	<p>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.</p>
<p>BCC need to fully understand the unique small primary / nursery school situation and support accordingly. Is academisation the only option for these settings?</p>	<p>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.</p>
<p>We don't have a very long period of time to undertake this intensive piece of work, regarding aspects that we are not necessarily experts in, especially as we need to continue with business as usual in school. How will you support us?</p>	<p>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 support has been offered while we are waiting to see if the recommendations are agreed, which can be found in this update. Whilst ongoing support will be offered to schools who need it, which will be outlined once we have received and collated the survey issued following cabinets decision.</p>
<p>This has made me feel that as Headteacher, I am now responsible for ensuring all staff get paid and to manage their pensions. Can you reassure me?</p>	<p>Your payroll provider will be required to produce the monthly pension files in the correct format to BCC together with the correct pension contributions. BCC will then process them on your behalf. If there is any query, it will be passed back to the payroll provider.</p>
<p>School staff are already stretched and well above capacity in their current roles. Who should pick up this huge extra responsibility in your opinion?</p>	<p>We acknowledge that this change will result in new responsibilities in schools. None of the options available would have avoided some level of impact in schools. We know there are schools who operate effectively as chequebook schools or successfully use other providers for their HR and payroll now. Schools should think about where the new responsibilities sit best in their school. There may also be opportunities to work together to share learning and experiences.</p>
<p>This is a large added responsibility for smaller schools without business managers. An extra role will have to be created to accommodate these additional responsibilities. How is this funded?</p>	<p>There will be no additional funding associated with this change.</p>



Theme 6: The future of SFS is also uncertain and clarity around this decision is vital.	
Please can we have a timeline for SFS costs and decision regarding its future communicated with schools.	The new SLA for SFS, aimed at providing an effective service that schools can afford, will be designed and circulated by mid-November. Schools will have a deadline around Christmas to respond. Exact dates TBC.
SFS are amazing, but understaffed, if we all sign the SLA for 25/26 will there be recruitment to meet the demands of every school?	We will ensure that the financial expertise and staffing capacity is there for the service required and further recruitment will be made if necessary.
SFS already have a statutory role monitoring school's compliance that was funded from DSG. Will this continue?	Yes
Will the BCC compliance overview mean more work for schools? What does this look like in terms of schools returns etc?	BCC will need to make sure that it is able to continue to meet all its statutory duties. We will explore how the services are best provided during this period of business change to make sure we can operate effectively, whilst having the least possible impact on workload in schools.
As we will all be chequebook schools, will SFS colleagues have enhanced training so that they can assist schools, especially in regard to the reporting demands that schools will have.	Yes, all SFS finance officers are receiving training to support FCB schools
Theme 7: How can we ensure future communication is effective?	
What is the plan to ensure regular communication with schools around the issues arising from the announcement?	We are continuing with the same communication plan that worked before the summer holidays. There will be Oracle Transition for Schools Updates and Q&A linked through Schools' Noticeboard each week. Important emails will also be sent to Headteachers directly from Education and shared by BASBM with its membership.
Where will we be able to access all the information promised today, such as the recording and slides from	The easiest place to access all important updates and documents, such as the recording, slides, links to support webinars and governor packs etc, is the Oracle Transition Update and



today, the governor packs and the links to various support webinars?	Q&A document linked through Schools' Noticeboard.
Where can I find the Q&A document that highlights all the questions asked since the announcement?	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 24 th September have now been archived and can also be accessed through that document.
How will the cabinet decision be communicated?	The cabinet decision on 15th October is subjected to a possible call-in procedure, which takes 48 hours. As soon as we know the final decision it will be emailed to Headteachers by Education, and shared with Business Managers via BASBM, no later than Friday 18 th October.
Census day in school is 3/10/24 and it is the main financial census, so it is a shame the Going Chequebook Webinar is on the same day, can this not be changed?	We are sorry for this clash and the webinars scheduled for this day have been rearranged as follows: Wednesday 9th October at 11am: Going Chequebook Webinar with BCC finance Thursday 10th October at 2pm: DfE Buying for Schools Team Webinar The links can be found earlier in this document.
Will the support from BCC continue right up to September 2025?	Yes, there will be support right through to the completion of this project in September 2025.

