

## **The Oracle Transition for Schools, options around becoming a full chequebook school and other considerations**

**Briefing document for Governing Bodies – Published 11<sup>th</sup> July 2024**

**What has been decided:** The Oracle Improvement Board has been assessing the future of Oracle and is planning to reimplement Oracle to address wider system issues across the council, but recommendations have also been made in a Cabinet report, approved in May '24, that the reimplementation does not include the use of Oracle for schools. This is because:

- The existing Oracle service for schools contains workarounds which are expensive, unsustainable and not meeting the needs of schools to run efficiently.
- Additional costs would have to be passed on to schools through increased trading charges, which would not represent value for money for schools.

The council remains strongly committed to ensuring schools receive the best possible services to support their activities, and as such there is an ongoing options appraisal project to identify the best options for schools in moving away from Oracle use.

It is important to note that there will be no changes to existing arrangements until September 2025 and we plan to support schools effectively through the transition over the next 16 months. In the meantime, we will continue to work around the Oracle issues and provide an SLA offer taking us up to 2025.

Sue Harrison, Strategic Director Children and Families, is the CLT member with responsibility for the project and each area of Schools Traded Services has a workstream lead:

- HR – Heather Wheeler-Jones
- Payroll – Seamus Cooney
- Finance – Neill Butler

Alongside them, Catherine Taylor-Ludolf will be leading the delivery of the project and will be covering the people aspect of the project. Chris Etheridge is the main point of contact for schools.

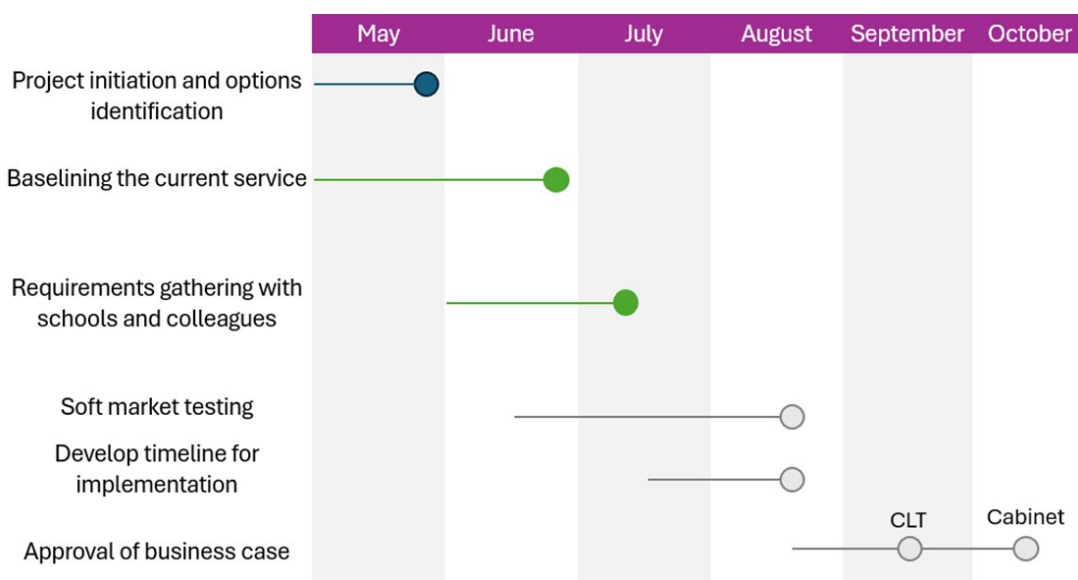
**Decision Making Timeline:** From Sue's meeting and webinars with schools, it should now be very clear that BCC are considering a full spectrum of options, from 'do nothing' all the way through to the option mentioned in the Cabinet Report of 'considering sale or transfer of the business activity' and everything in between.

All options are being assessed against a set of agreed criteria which include:

- Ensuring schools have a workable solution by Sept '25.
- Supporting the BCC Improvement and Recovery Plan.
- Providing value for money for schools and BCC.
- Ensuring schools have access to appropriate advice and guidance.

- Ensuring schools and BCC can meet their statutory obligations.

Sue was also able to share the decision-making timeline as shown below. It is hoped that schools can be made aware of the decision in September. Sue has the delegated authority to make the decision, but if the decision needs to go to Cabinet, it will be going to the **October 15<sup>th</sup> meeting**.



**How can schools prepare for the decision:** A key question for BCC is how can we support schools to have full agency in this situation? As a non-chequebook/EPA school, what options do you have to move forward?

- 1) Choose to become a full chequebook school.
- 2) Wait for the council to make their decision, which you will need to respond to, and that may involve becoming a chequebook school.

We are keen for schools to be able to make their own decisions and there have been a number of schools commit to go chequebook in April 2025. There are also a number of schools who have converted to chequebook recently reporting positive experiences. But there are questions and concerns from schools around existing protocols, such as if your school is in deficit or projecting a deficit, for example.

BCC will provide the following support for schools considering going chequebook:

- This governor briefing document, alongside a summary guide on converting to full chequebook status and PowerPoint slides were shared via the Drop-In session on 11<sup>th</sup> July, Headteachers' emails and BASBM.
- A webinar about the process of moving to chequebook status for interested schools will take place in September, which will include timelines for action planning and information around the tailored support for schools in deficit or projecting a deficit. We want to make it as easy as possible for any school to convert if they want.

- A buddying system with chequebook schools local to you will be available to support schools through the transition.

Key questions we have received from schools around converting to full chequebook status.

**Financial Year timing:** *How would conversion to chequebook status work in September, half-way through the financial year? Is April a far better target and can this be achieved following September or October announcement?*

A – April would be a better time to move to chequebook status and if schools choose to become chequebook now, then April is certainly achievable. *Although we are also investigating the potential of moving schools over on quarter start dates, i.e. 1 October 2024 or 1 January 2025.* There are already a number of schools who have indicated their desire to change status and they will be supported to do this in time for April. If schools have to move to chequebook status as a result of any decision shared in September or even October, then there is still time for this to happen for April 2025. There will be governance and training issues to be resolved and a detailed implementation plan for how to achieve this would be in place.

**Deficit budgets:** *I believe that it was stated that being in a deficit budget situation would not stop a school becoming a full cheque book, can more information be provided on this please?*

A – The LA is currently working a plan to support schools in deficit and the impact this would have on a school converting to full chequebook status. More information will be shared with schools after the summer holidays in the webinar mentioned previously.

**Bank Accounts:** *Will the barriers to schools getting bank accounts, such as being in deficit, be removed? Have the banks been consulted about this?*

A – Although it is too early to give exact detail at this stage, the LA is currently in discussion with some banks and how this solution could work. Initial conversations are very positive, and it is hoped an appropriate solution can be shared in due course.

### **Other considerations**

As with any potential change it is important to consider the impact certain decisions may have on your setting. Although exact information about what the future holds cannot be shared until the decision is made, it is worthwhile considering what you would do in certain instances.

### **Key Contacts**

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