Birmingham City Council

3rd October 2024

Oracle transition for schools
Archived Questions and Answers

The questions and answers below are a record of those asked before the recommendation was shared and the document remains unchanged since 18th July 2024. We have archived it for your reference. *A new document containing all questions since the announcement is included in the Oracle Transition for Schools Updates linked through Schools' Noticeboard.*

Theme 1 – We need more clarity on what is happening and the decision-making process.

Q1 - *What do we know so far and who has made the decision?*
A - 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.

Q2 - *Who are the lead people and who knows what is going on?*
A - Sue Harrison, Strategic Director Children and Families, is the CLT member with responsibility for the project and each area of Schools Traded Services will have a workstream lead:

- HR – Heather Wheeler-Jones
- Payroll – Simon Ansell/Seamus Cooney

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- 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

Q3 - Is there a formal consultation planned? If not, why not?
A - We want to work with schools to explore the options available to us, but we are not planning a formal consultation period. The decision is a Cabinet decision, but Cabinet have chosen to delegate those powers down to Sue Harrison and the lead member for Children, Young People and Families.

Q4 - What are the options that BCC are considering and how do we ensure that any options appraisal takes account of full costs to schools of these different options, not just cost to core council?
A - We 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. We are assessing all the options 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 VFM for schools and BCC,
- Ensuring schools have access to appropriate advice and guidance,
- Ensuring schools and BCC can meet their statutory obligations.

We will be working closely with schools throughout the options appraisal to understand schools' requirements, needs and the impact of any of the options we progress.

Q5 - Is this a push to become an Academy by BCC?
A - No. As a council, we don't want this project to incentivise schools to move to academy status but recognise that that might be one of the unintended consequences. We will work with schools as we always have to help them understand the pros and cons of academisation and whether that is the right option for them.

Q6 - *Why was there no Q&A from the end of the face-to-face meeting last week shared in the recording? This was a very informative part of the session and I think other schools who could not attend would benefit from hearing this.*
A - Unfortunately, this part of the recording was not suitable to share due to technical issues around the audio for questions asked. Any questions regarding the Oracle transition for schools that were not already answered in previous updates have been added to this document.
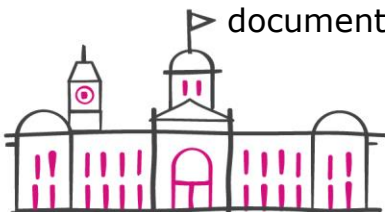
Theme 2 – We need a detailed timeline for this process. What are the key decision and information sharing dates?

Q1 - *Do you think there will have enough time to do this successfully before September 2025?*
A - The timeline has been worked up with the Oracle programme to make sure that milestones are clear. The timeline is tight, but it is right that we spend time properly considering all the options available to us to make sure that we are not making the wrong choice. We will have to work closely with schools to make sure they are ready and have everything in place to move to any new system, but this is likely to happen in batches instead of getting all schools to move at once.

Q2 - *September 2025 is very soon. The decisions regarding options need to be made asap for the implications for schools to be properly considered.*
A - The timeline has been worked up with the Oracle programme to make sure that milestones on both projects align. The timeline is definitely tight, but it is right that we spend time properly considering all the options available to us to make sure that we aren't making the wrong choice. We should be able to share a timeline for when decisions will be made in the next update of the Q&A once it is signed off.

Q3 - *Understanding the timeline is very important. For a September 2025 implementation, the solution will need to be ready for schools in July 2025. Therefore, a review / agreement would likely need to be in place for Dec 2024 - this is not far away!*
A - The timeline for decision making was shared by Sue Harrison at the meeting and webinars the week commencing 17th June. The link to the PowerPoints and video recordings from those sessions have been shared in both update documents and schools' noticeboard. The timeline highlights that following the baselining of services in June and requirements gathering from schools in July, there will be a business case developed over the summer holidays involving soft market testing and an implementation timeline for the chosen solution. This will then go to BCC Central Leadership Team (CLT) in September and possibly on to Cabinet on 15th October. Sue has committed to sharing the information contained within the business case ahead of any final decision being made.

Theme 3 – If there is a new system, how will they ensure there is no repeat of the issues with Oracle?

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Q1 – *What are you planning to replace Oracle with? Are you going to test the program prior to rolling it out to ensure it is fit for purpose?*
A - The decision has been taken that the reimplementation of oracle will not include schools. Beyond that, we are exploring all the options available to us. It is too early to know which solution will be the best one for our teams and schools, but we will certainly keep you involved in the conversation - seeking your input as the project progresses.
If the selected option is to implement a new system in Oracle's place, there will be extensive testing. This will have to include BCC colleagues as well as schools' colleagues to ensure the system works for both of us.

Q2 - *Will the current system end abruptly before the new one begins?*
A - No. Oracle will not be reimplemented before September 2025. Between now and then we will be exploring the best option for schools and colleagues and then working to ensure all schools are ready to begin using the new solution before Oracle is switched off.

Q3 - *How will it now benefit schools to move to another system?*
A - Schools do not have the option to remain on Oracle as it will not be reimplemented for schools from September 2025. The project will work with schools and colleagues to identify the best option available to them in the light of that decision.

Q4 - *If there was a new system, would there be an implementation process involving SBMs?*
A - BCC are keen to ensure that Schools Business Managers are communicated with effectively and their experience and expertise used to support this transition. As part of the initial phase of this project there will be fortnightly informal MS Teams drop-in sessions to share information and gather further queries, alternating with fortnightly updates with Q&A shared via Schools' Noticeboard, HT emails and BASBM. From the drop-in sessions we are hoping that a reference group for School Business / HR / Finance Managers can be put together from those who attend, to ensure that the voice of schools is heard throughout this project.

The timetable for these school engagement opportunities up to the summer holidays is shown below:

Thursday 20th June	Noticeboard update / Q&A
Thursday 27th June, 10am	SBM / HT Teams drop-in session
Thursday 4th July	Noticeboard update / Q&A
Thursday 11th July, 10am	SBM / HT Teams drop-in session
Thursday 18th July	Noticeboard update / Q&A

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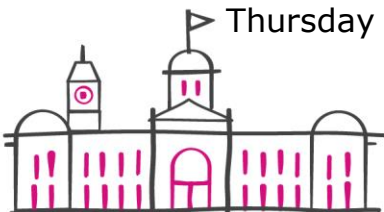
Theme 4 – What is the future of schools traded services and how will BCC support with any transition to new providers if that is needed?

Q1 - *HR, Payroll & SFS - will they still exist and be available to schools to purchase? Or will we have to find new providers?*
A – We are not ruling out any of the options at this stage, so that includes considering whether BCC continues to provide traded services to schools in the form of HR, Payroll and Finance. We appreciate it is difficult to be in a position of uncertainty and we want to keep you as up to date as possible.

Q2 - *What services will/could schools lose?*
A - There is no change in the services on offer until September 2025. At this point we don't know what the future solution will look like until we have finished conducting the thorough options appraisal. This will include talking to schools about what services they want and need.

Q3 - *How will BCC support if all maintained schools need to look for new suppliers for payroll, pensions, HR and financial support?*
A - If there is a decision that schools will need to move away from BCC services there are mechanisms we can use to help schools with that. For example, we could explore a preferred supplier list or a procurement framework. However, at this point, no decision has been made about what option would be best for schools or colleagues. All options remain on the table while we conduct a thorough options appraisal.

Q4 – *How could BCC cope with every school going out to tender to different HR, payroll and financial services at the same time in terms of off-boarding data?*
A - The provision of information to facilitate schools who are off boarding is a well-rehearsed process and will be given priority. It is likely that not all schools would off-board at the same time. If there is a decision that schools will need to move away from BCC services, there are mechanisms we can use to help schools with that. For example, we could explore a preferred supplier list or a procurement framework. However, at this point, no decision has been made about what option would be best for schools or colleagues. All options remain on the table while we conduct a thorough options appraisal.

Q5 - *If schools need to find their own services or take in house, will, there be additional funding given to support this. Staff may need to be recruited for example.*
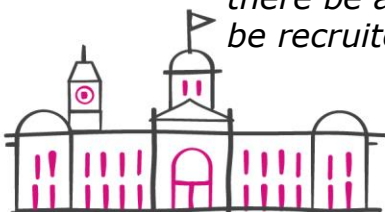
A - Under Fair Funding and Delegation of Finances to Schools rules there is no scope to give schools any additional funding for this.

Q6 - How will schools be involved in data cleansing, to ensure all data is correct at time of off-boarding, should they choose to move to new HR and Payroll providers?
A - From a HR perspective, we do not currently have any specific plans to undertake a data checking/cleansing activity. Where schools believe data is incorrect, we would anticipate that they would bring this to our attention or rectify it themselves, in real time and on an ongoing basis. We have schools leaving frequently at the moment and we are not aware that there has been any data integrity issues. If necessary as we move through the process, if there are data cleansing requirements, we will look at implementing a process.

Theme 5 – Effective communication from BCC to schools, and vice versa, is essential in this process.

Q1 - *Is there a list of BCC contacts that can be shared to show who we should contact for specific queries?*
A – We want to ensure that we can capture all queries from schools about the transition from Oracle, without blocking up existing lines into the LA. As such, we are proposing that the existing email address OracleSchoolsRelationship@Birmingham.gov.uk is used to communicate all questions, queries and concerns. This will be monitored daily with finance, HR and payroll colleagues addressing specific emails. As such, please include the nature of your query and the most suitable service to address it in the title bar.
There are also several engagement and information sharing opportunities, open to Headteacher or Finance/HR leads as highlighted at the start of this update.

Q2 - BCC staff working in schools need to have a full understanding of this and be able to articulate this to schools.
A - BCC staff are being updated weekly on progress of the project and have access to all the Q&As received by schools. Please escalate any questions that BCC officers cannot respond with clarity to oracleschoolsrelationship@birmingham.gov.uk and they will be added to this document.

Q3 - Where are the high-level officers within BCC to face us, explain and discuss.
A - To ensure schools remain fully up to speed with progress on the latest developments, Sue Harrison Director of Children and families, is holding sessions for specific groups of schools as follows:
• Non-chequebook and EPA schools – Wednesday, 19 June 2024 at

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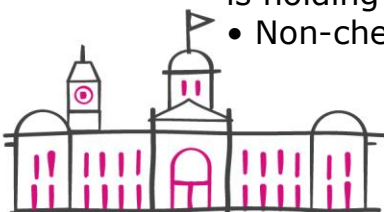
14:00-15:00. In-person meeting at Bellfield Junior School, Vineyard Road, Northfield B31 1PT
• Chequebook schools – Friday, 21 June at 11:00-11:30
Webinar via Microsoft Teams
• Academies – Friday, 21 June at 11:45-12:15
Webinar via Microsoft Teams
The links for the webinars can be accessed through Schools' Noticeboard. A recording of the webinars will also be made available for those unable to attend or to act as a refresher.

Q4 - Please can we make the links for the fortnightly drop-in sessions as easy as possible to find.
A – There has been good attendance at the fortnightly informal MS Teams drop-in sessions to share information, gather further queries and use the wide range of expertise available in schools. The last of these online sessions before the summer will be at 10am on Thursday 11th July and has a focus on gathering the voice of schools in terms of their requirements from any future solution. The link for these meetings can be found in the 'Oracle Transition for Schools Update and Q&A' document shared fortnightly via a link in Schools' Noticeboard. This link can be found in the Oracle Finance, Payroll and HR section. Our colleagues at BASBM also distribute this information to School Business managers to ensure everyone is aware of how to find this information.

Q5 - If any additional meetings need to be held, can we have a more central location please?
A - If any further meetings are held in person, then a school in a central location, or on the other side of the city from the previous meeting will be sought to host it.

Q6 - The drop-in sessions have been very useful, but not all colleagues have been aware of them. With the Teams link being within the fortnightly update, sometimes it has been hard to find, or some staff may not have realised this. Is there any way communication could be clearer around this?
A - The fortnightly Update and Q&A document is linked through Schools' Noticeboard as it is quite large. Schools Noticeboard is accessible by all staff in schools, and we would encourage all Headteachers and School Business / Finance / HR managers to read it. The Oracle HR, finance and payroll update is the second link after Sue Harrison's introduction. Alongside this we have emailed Headteachers and worked with BASBM for them to share the information with SBMs. This three-pronged approach to consistent communication from BCC will continue in the Autumn term. However, we are constantly seeking feedback about how we can communicate more effectively, and as such would welcome any
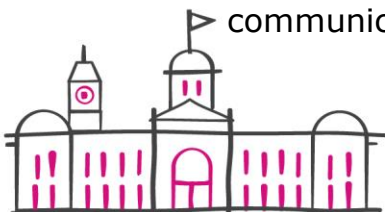
suggestions about how to improve this further. This will be on the agenda of the first drop-in session next year. Date TBC.

Theme 6 – There is a wealth of expertise and experience in schools. We must ensure that School Business Managers are involved in this process.

Q1 – *How will you ensure SBMs are involved in the process alongside HTs? Many of them did not receive any information about the transition.*
A – To ensure that SBMs are aware of any vital communications going forward it is important that they check noticeboard every Thursday as this is a primary route for information sharing to all staff. We do send emails directly to Headteacher email addresses and will continue to do so. These HT contacts are updated weekly through GIAS (Get Information About Schools), but since SBM contact details are not updated in the same way, we are also working closely with BASBM (Birmingham Association of School Business Managers) to ensure that key communications are shared via their forums. We hope that this three-pronged approach will ensure all parties are kept up to date as the project develops.
The MS Teams drop-in engagement sessions on 13th June, 27th June and 11th July will also provide an opportunity for any key staff in schools to attend to hear information, ask further questions and offer a range of expertise available in schools as we manage this transition. It is hoped that a reference group for School Business / HR / Finance Managers can be put together from those who attend these sessions, to ensure that the voice of schools is heard throughout this project.

Theme 7 – Specific financial questions

Q1 – *Will there be any reduction in costs / services bought in from BCC as per previous year regarding the ongoing issues?*
A – Unfortunately the council cannot repeat the fee concessions for this year and prices will therefore return to the pre-discounted state plus a 10% fee increase to all traded services for the 2024/25 SLAs. Due to the continuing limitations of Oracle, there will be some amendments to this year's HR provision as we are not able to offer the following:
• Academy Accounts Return (AAR)
• Supporting schools following transfer to Academy status
• On-boarding schools to existing Academies

Q2 – *Is the vision for all LA maintain schools to convert to full chequebook status to allow an external Payroll/HR providers and self-payment of invoices.*

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A - At this point, we are exploring all the options that are available to us. It is too early to know which solution will be the best one for schools and BCC. How it will work in practice is heavily dependent on what solution we decide is the best. We know that converting all schools to cheque book would a massive piece of work which would require a lot of thought and planning from BCC and schools, and we would want to work with you throughout. We know all schools have different levels of financial expertise regardless of what accounting mechanisms they use. We may have to take a risk-based approach to identify which schools will need more help and support and those which may require less. It may be worth thinking about how much support you might require should we need all schools to become full chequebook and what the impact might be for you and your teams.

Q3 - *Can we have a breakdown of what BCC currently top-slices from the Direct School Grant and how this will change in their new vision.*
A - BCC does not top-slice funding from the Schools' Block Dedicated Schools Grant (DSG). BCC do de-delegate some functions, but this only occurs through agreement with schools and schools forum. Contingencies, Staff supply costs and behaviour support are the only de-delegated functions currently.

Q4 – *What will BCC compliance/audit function look like moving forward?*
A – BCC audit requirements will likely not change, and this will be confirmed as we move through the process.

Q5 - *Birmingham need to waive charges for traded services if we leave earlier and tender elsewhere.*
A - Schools will only pay for services for the period they receive them.

Q6 - *Why is the implementation in the middle of the financial year? Oracle ends Sept 25, but SLAs are April 24 – Mar 25. How will this work?*
A - The project needs to be completed by September 2025 as this is when Oracle is being reimplemented for corporate BCC and turned off for schools. A part year SLA will be provided where required for April 2025 to September 2025.

Q7 - *If all schools ultimately have to go full cheque book – what is the consideration for staffing implications and workload?*
A - As with any school moving to full cheque book status the LA will support schools' staff with this transition.

Q8 - 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.

Q9 - What assistance will be provided to schools at budget setting in April 2025, as there may be scenarios where schools are renewing contracts/SLA's but may not be able to have a full 12-month option due to changes in Sept 2025?

A – BCC will support schools as much as possible through this process and regular finance updates for schools are being planned for next year by phase / type, so that schools are always aware of the latest developments and the implications for them. Exact details to follow in September.

Q10 - There needs to be better financial training for new headteachers

A - There will be a training programme next year that will commence in the second half of the autumn term. Expressions of interest have been sent to schools.

Q11 - There needs to be a better relationship with BCC finance going forward, which has at times felt disconnected due to staff changes and lack of communication.

A - Schools finance is intending to introduce termly SBM meetings with schools by type / phase. Further details of these will be shared with schools in September. We are also planning regular drop-in sessions for schools to have the opportunity to raise concerns with schools' finance.

Q12 - As a SEN school we have to use Oracle to draw up an invoice to be sent to other LAs in order to claim the additional top up funding due. How will this be managed going forward?

A - Depending on the decision made, and the implication for schools of that, this may be something that continues if a new system is implemented to replace Oracle. If the decision means that all schools must become chequebook schools, it would be anticipated that any new financial system a school uses would have the functionality to raise invoices.

Theme 8 – Other technical questions

Q1 – Will the change from Oracle involve a change to the 'simplified' loader?

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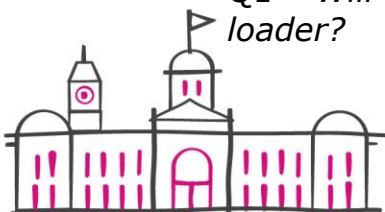
A – Simplified Loader is a third-party solution which the Council procured to support upload/processing of large volumes of information through Oracle. Whilst the Council uses this for several processes the key users are Non-Cheque Book and EPA schools who utilise the functionality for upload and processing of invoices for payment. Continued reliance on SL for schools' payment processing will be considered as part of the developing options appraisal, as will the Council's reliance as part of the Oracle reimplementation program.

Theme 9 – Following on from the meetings in June, we need more specific information about the process involved for a NCB/EPA school to convert to full chequebook status.

Q1 – *I note that Sue mentioned that there would be more information for schools who may wish to become full cheque book. Where can I find this information please?*
A – BCC will provide the following support for schools considering going chequebook:
- A summary guide on converting to full chequebook status and a briefing slide for use at governing board meetings about the situation to be shared in 11th July Noticeboard and Drop-In session.
- 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.
- A buddying system with chequebook schools local to you will be available to support schools through the transition. Interested buddy schools please sign up to support this initiative, details below:
Chequebook buddies wanted - If you are a Business / Finance Manager in a school that has gone chequebook in the last couple of years and would like to be a buddy to schools moving chequebook now, it would be much appreciated.
Please contact Neill Butler (Schools finance business partner) and Chris Etheridge (Oracle Schools Relationship Manager) on the email addresses below so we can map these out across the city.
Neill.Butler@birmingham.gov.uk and
chris.etheridge@birmingham.gov.uk

Q2 - *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.

Q3 - At the meetings Neill Butler discussed the possibility that a solution could be in place for April'25? Does this remain a possibility given the timescales involved and it remains on the table or is it considered unrealistic?

A – Neill's comments were around a firm ambition to move any maintained schools that choose to go chequebook by April 25, as it is the schools' financial year. If the decision made means that all schools will need to go chequebook then that would remain the ambition, but a detailed plan for how to achieve this would need to be in place.

Q4 - 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. 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 plan for how to achieve this would need to be in place.

*Q5 - Will we be able to pay by BACS if we become a chequebook school?*

A – One of the benefits of becoming a chequebook school is that you can make payments by BACS.

Q6 - Can a Special School convert to a Full Cheque Book school if they have either a small surplus or deficit every year, and if a large proportion of their pupils are from other Local Authorities.

A - We would expect all schools to be able to convert to full chequebook. Managing special schools with large numbers of OLA needs to be addressed as a separate issue to ensure the school receives funding in a timely manner.

Q7 - Did anyone do the briefing for us around going to cheque book? We would like to know more and how to put our names forward to move in April.

A - The webinar for schools who are interested in converting to full chequebook status will take place in September so that key information around questions such as bank accounts and schools in deficit can be answered. In the meantime, we have developed several documents to support schools considering conversion. These

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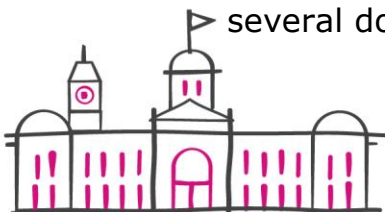
were shared in Schools' Noticeboard last week and can be found in the link in the update at the start of this document. These include the full preparation document on conversion to chequebook status and a two-page summary document. There is also a briefing note and slide deck for use with governors and/or school staff.