

**Oxfordshire Schools Forum
Meeting 12 January 2017**

Business, Education and Learning Services to Schools and Academies

Settings		Sector	
Academies	✓	Foundation Stage	✓
Maintained Schools	•	Primary	•
PVI Nurseries	•	Secondary	•
Special Schools	•	Special	•
Local Authority		16+	
Schools Forum		High Needs	

1. Item for Comment/Information

Traded services to schools have been through significant change during the past two years. However, Oxfordshire County Council continues to trade with schools successfully and Early Years is embarking on a fully traded model as DSG support decreases. Many services have ceased, and some have been transferred to new providers. Business Services and Education and Learning Services delivered by the Children, Education and Families Directorate (CEF) are administered separately and Quest no longer exists.

Business Services include services provided to maintained schools by HCC, plus the following which are also available to academies.

- Occupational Health
- Employee Assistance Programme
- Office 365 Admin Support
- Sophos License

*Please note Schools Health & Safety Service has now transferred to CEF and is available to schools and academies.

Education and Learning traded services available to all schools and include:

- Governor Training
- Clerking
- OXSIT
- Schools Health & Safety
- Performance and Information Team Offer
- Early Years Offer -

There is also an opportunity for schools to purchase Educational Psychology and SENSS products

Prices have been reviewed and information has been made available via the Schools Intranet and Schools News for the next booking period for Business Services is from 1st April 2017 for Maintained Schools and from 1st September 2017 for Academies.

For Education and Learning Services the service period will run September 1st 2017 until August 31st 2018 in line with the academic year.

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Please note that all information will be provided on-line.

2. Purpose of Report

Following the significant restructuring of services and the end of the transition period it is necessary to extensively review charges. This paper provides the details and explanation of planned charges for Business and Education and Learning services to schools.

3. Key Points

Business Services

- An attempt has been made to rationalise a variety of different service periods during the transition period. Maintained Schools booked services from HCC for 21 months from 1st July 2015 to March 31st 2017.
- Services provided by HCC to Maintained Schools are bundled and the service period will be for 3 years until 31st March 2020. Prices quoted here are the annual charges for 2017-18. They will be inflated by 2% in 2018/19 and a further 2% in 2019/20. Charges will be updated at the start of each financial year to use staffing or pupils numbers from the most up to date census returns.
- Maintained schools will be asked to confirm the services they want during December 2016, Academies will rebook in June 2017.
- We can now confirm that SOPHOS License will be available to schools and academies beyond March 2017. We are not yet in a position to confirm the price for this service as we are only just entering the tendering process. Information will be sent to maintained schools and academies, as soon as we are able and the booking process will be run separately.
- All services terminate upon conversion and the services available to academies can be booked at a prorated charge from the point of conversion until the end of the current academy service period.
- Licenses are booked for 12 month period and are non-refundable.
- Services can be terminated with 3 months' notice, however considerable preparation and planning is required by a maintained school wishing to transfer HR and Finance services to an alternative third party provider. We therefore advise a 12 month period would be required where the school can work with OCC to prepare for such a transfer of services.

Education and Learning Services

The service period will run in line with the academic year for a 12 month period. All schools will be asked to confirm their buy back by Friday 28th April 2017. Schools that are late in returning their requests will incur a 25% on cost of the annual total charge. Please note that this is still cheaper than a school paying PAYGO rate, however it will encourage schools to sign up promptly and for the services to accurately predict income.

There will be no reduction in costs for late applications throughout the academic year.

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4. Explanation of Changes to Charges

Business Services

HCC Services

OCC receive quarterly charges in arrears from HCC for Education Personnel Services, Education Financial Services and IBC. EPS and EFS are exclusively provided to schools. The IBC charge is a proportion of the Council's overall charge.

Services from PAM Assist

There has been a small reduction in charges for EAP and a small increase in OH charges largely due to the increase in administration. Where 48 hour cancellation notice is not provided to Occupational Health by the referring manager the school will be charged separately for the appointment. This can range from £82.50 + VAT for OHA or £150.00 (no VAT) for OHP - unless there are exceptional circumstances.

Statutory Insurances for Schools

The statutory insurances have once again been procured on behalf of schools and are made available again for 2017/18

Unfortunately premiums have risen by 4.86% across the whole package (Policies covered by the package being, Liability; Premises; Motor & Engineering)

Individual school increases may vary if not all policies are applicable to individual schools. The majority of the increase in premium is due to the increase in Insurance Premium Tax (which the Government has increase from 6% to 9.5%.)

Claims experience across the Council' portfolio makes up the remainder of the increase which is apportioned across all Council Directorates and Schools.

Actual prices for each school will be available on the schools intranet by the end of January/early February dependent upon the speed of availability of pupil numbers.

Charges for 1st April 2017 – 31st March 2018 will be via automatic upload and taken in June 2017

Please note there is no refund on Insurances Premiums when a school converts to academy status mid financial year. In the event that a non-Academy converting school wishes to opt out of the county council's insurance arrangements it must provide the Council's Insurance Manager 12 months' notice and subsequently put in place an alternative insurance package of a minimum standard, details of which will need to be confirmed in writing and forwarded to the Insurance Manager for approval. A school can only opt out of the whole package of insurance policies offered; this includes the additional options offered direct to schools such as theft and vandalism cover and school journey insurance.

Administration Fee

It is necessary for OCC to recover the cost of administering services. For Schools that are part of the Council, for whom contractual documents are not required and charges can be uploaded automatically, the administration cost is 1.5%. Academies, however require contractual documentation and individual invoicing, so a 3% administration fee will be applied. These are included in the charges quoted here, but appear as separate items on charging documentation.

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Full Cost Recovery

OCC, by necessity, has been working towards full cost recovery of all services to schools for some time. This includes administration charges, some overheads, as well as the costs of managing the services schools receive from the HCC partnership.

In the current service period the council has fully recovered the cost of EFS and IBC HR services from the schools. However the council has not recovered enough income to cover the cost of EPS, IBC Finance or administration. The pricing structure has been adapted to reflect this. The overall price increase can largely be attributed to the need to more fully recover costs of these services plus inflation.

Education and Learning Services

Pricing from the various services is still being confirmed at this point but will be available from late January 2017

5. Impacts on Schools

Various charges were modelled against all maintained schools, in order to judge the impact of changes on schools. The average price increase on maintained schools for the HCC services schools is 7%, with schools falling into 1-13% increase. It is generally the larger schools that will experience the higher price increases.

6. Future Review by Forum

As requested by Forum.

7. Contact Details of Lead Officer/Author

If you have any queries or comments in advance of the Schools Forum meeting about this report, please contact

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8. Officers/Staff attending to present the Paper

Sara Carey

Attachment: Appendix to Paper 8