

## Oxfordshire Schools Forum 7 February 2018

## Traded 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 continue to go through change however, Business, Education and Learning Services continue to trade with schools and settings successfully.

Progress has been made to adapt and combine business processes to enable smoother buy back for schools and settings. The Business Delivery team now oversee the administration of traded services for schools. Colleagues calling **0330 024 9046** will be able to select **1** for Traded Services related enquiries.

As we enter the next round of service delivery the web pages will be revised and service information will be grouped together under one heading.

Please note a hard copy brochure will not be produced this year but information will be provided on-line.

Early Years have developed a successful traded package of support and continues to run “Step into Training” continuous professional development for practitioners.

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

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

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

- Governor Support
- Clerking
- OXSIT (Oxfordshire School Improvement Team)
- Schools Health & Safety
- Performance and Information Team Offer
- Early Years Offer

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There is also an opportunity for schools to purchase Educational Psychology.

Prices have been reviewed and information is shown within appendix A and will be made available by the 28<sup>th</sup> of February via the Schools Intranet and Schools News. Last year schools booked these services for a three-year period, so will not need to renew this year. Uplifted prices will apply, however from 1<sup>st</sup> April 2018.

For Education and Learning Services the service period will run September 1<sup>st</sup> 2018 until August 31<sup>st</sup> 2019 in line with the academic year.

**The closing date for buy back ends Friday April 27<sup>th</sup> 2018****2. Purpose of Report**

This paper provides the details and explanation of planned charges for Business, Education and Learning services to schools and settings

**3. Key Points****Business Services**

- Services provided by HCC to Maintained Schools are bundled and the service period will be for 3 years until 31<sup>st</sup> March 2020. Prices quoted here are the annual charges for 2018-19.
- They are inflated by 2% for 2018/19 and will be expected to rise by a further 2% in 2019/20.
- Charges will be updated at the start of each financial year to use staffing or pupil's numbers from the most up to date census returns.
- 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.
- Insurances 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 27<sup>th</sup> April 2018**. Schools that are late in returning their requests will pay the PAYGO rates. There will be no reduction in costs for late applications throughout the academic year.

## 4. Explanation of Charges

### **Business Services**

#### **HCC Services**

OCC determine the price schools pay based on quarterly charges paid 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 Occupational Health & Employee Assistance Programme** are now charged per head.

There has been a small reduction in charges for EAP due to the renegotiation of the contract last year. Please note that 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**

The statutory insurances have once again been procured on behalf of schools and are made available again for 2018/19

Unfortunately, premiums have once again risen across the whole package (Policies covered by the package being, Liability; Premises; Motor & Engineering) Individual school percentage increases will vary if not all policies are applicable to individual schools.

Actual prices for each school will be available on the school's intranet as soon as possible but likely not until the end of January/early February 2018.

*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.

### **Governor Services**

This service is being remodeled in response to the service review which took place last year. We have created a new post to manage the clerking service and are building up the capacity of the team to respond to schools' requests for this important service.

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We want to ensure that all Governors have the support they need, but we can only provide a limited service to Governors from schools not buying into the Governor Support package. In time, we would like all maintained schools to receive the Governor Support service as standard and would welcome any academies also wishing to purchase this service as standalone (see section 5) The information in Appendix A sets out the minimum support we plan to provide. We must now secure the resources to deliver this package via recruitment or commissioning. Until this exercise is complete we are unable to provide charges.

### Administration Fee

It is necessary for OCC to recover the full 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.

### 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.

## 5. Looking Further Ahead

It is necessary for OCC to consider how best to maintain services to the schools in Oxfordshire that wish remain within the Local Authority. The services for consideration include:

Essential/statutory for Maintained schools;

- IBC HR & Finance Transactional Services
- Finance Support (EFS)
- HR Support (EPS) including advertising vacancies
- Health & Safety
- Statutory Insurances
- Admissions appeals (presentation of case)

Services for OCC employees and establishments;

- Occupational Health
- Employee Assistance Programme
- Job Evaluation
- Legal services
- Media support
- Job evaluation

Services to support schools to become and sustain a “good” or “outstanding” judgement

- System Leader Support & Challenge

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- Early Years Foundation
- Governor Support Services
- OXSIT
- Exclusion prevention support
- Educational Psychology Services
- Performance & Information data services
- Attendance
- Safeguarding
- Health & Safety (Academies)

This list is not exhaustive and could include a variety of services such as Admission appeals.

OCC is committed to continue to make the above services available to all OCC maintained schools and some of these services to academies. To ensure the sustainability of these services it is important to understand the cost of their provision in relation to the potential revenue from a declining number of maintained schools. Inevitably there will be a tipping point. It is essential for both the council and schools to determine this, but more importantly for maintained schools to be reassured and secure in the knowledge of the support that can be relied upon from their Local Authority. It will be appropriate to make some services available to academies and in turn this will make those services more robust. However, we need to be looking at longer contractual agreements with academies in order to guarantee our capacity to deliver.

**School Forum members' views are invited in relation the following proposals**

- From September 2019, the services listed above should be made available to maintained schools as standard and as a bundle. This would enable sustainable planning to provide OCC schools with guaranteed business and school improvement services.
- Contractual periods for services to academies should be extended to three years starting in September 2019 and the 3-month termination notice should be increased to 6 months.

Please note, we will continue to consult on this proposal with colleagues in schools throughout the year at school briefing meetings.

**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  
Name: Sara Carey  
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Email Address: [sara.carey@oxfordshire.gov.uk](mailto:sara.carey@oxfordshire.gov.uk)

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## 8. Officers/Staff attending to present the Paper

Sandra Higgs
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## Appendix A

## Education and Learning Services to Schools 2018 – 2019

Service	Product	18/19 price			Comments
<b>IBC Transactional HR</b>	Payroll & Contracts	£53.58 per occupied post			Available to maintained schools only as a bundle. Academies wishing to purchase EPS services should enquire direct.
<b>IBC Transactional Finance</b>		£153 per school plus £1.89 per pupil			
<b>Education Personnel Services</b>	HR Advice and support	£25.50 per occupied post Minimum £306 per school			
<b>Education Finance Services</b>	Financial support and advice	<b>School type</b>	<b>Pupil numbers</b>	<b>Price</b>	
		Primary	Up to 50	£1,660	
		Primary	51-150	£2,078	
		Primary	151-300	£2,987	
		Primary	301 - 1000	£3,533	
	Secondary	-	£5,200		
<b>Occupational Health</b>		£11.31 per person			Maintained Schools
<b>Employee Assistance</b>		£6.21 per person			Maintained Schools
<b>Occupational Health</b>		£11.50			Academy Schools
<b>Employee Assistance</b>		£6.30			Academy Schools
<b>Office 365</b>	Pupil numbers on roll		Primary, Special and Nursery		Academies
	1-99		£181		£186.43
	100-199		£207		£213.31
	200-299		£234		£241.02
	300-449		£256		£263.68

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	450-649	£331	340.93
	650-999	£408	
		Secondary schools	Academies
	Up to 700 students	£500	£515
	Above 701 students	£750	£772.50
<b>Educational Psychology</b>	1-9 days	£550 per day	Partnership requests are welcomed and a 10% reduction is available for partnerships purchasing 40+ days
	10+	£500 per day	
<b>Early Years Foundation</b>	Standard Package	£300 per setting	PAYGO rates Full day £550 Half day £300
	Enhanced Package	£1300 per setting	
	Early Years Toolkit	£260 per setting	Oxfordshire Schools & Settings
	Early Years Toolkit	£320 per setting	Out of County Schools & Settings
<b>Clerking Services</b>	Clerking for 6 x 9 hr FGB meetings	£1550.00	Additional meetings @ £310 (per 9hr session) Additional Meetings @ £250 (per 7 hr) Exclusion meetings @ £360 (per 9 hr session)
	Clerking for 6 FGB meetings plus 6 x 7hr committee meetings	£2900.00	Additional time @ £ 40 per hour  NB: the above options are not available as a standalone service
Non LA Clerk's induction training (6 hours)		£350	
Briefings & other training for non LA Clerks		£550	To include three two hour sessions for induction and Clerks CPD training
<b>Governor Services</b>	Please note that this service is currently under review. Service details and pricing will be confirmed shortly (See section 4)		
	<p><b>Core package:</b></p> <ul style="list-style-type: none"> <li>• Advice</li> <li>• Access to tool kit (TBC)</li> <li>• Either Governor hub/Learning Link or Modern Governor (TBC)</li> <li>• Governor training</li> </ul>		

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<p>Training to include unlimited induction courses.</p> <p>Unlimited attendance on the following courses:</p> <p><b>Data</b>  <b>Finance</b>  <b>Safeguarding</b>  <b>Health and safety</b>  <b>Vulnerable pupils / SEN</b>  <b>Preparing for Ofsted</b>  <b>Chair of Governor training</b>  <b>Early Years</b>  <b>Moving from Good to outstanding</b>  <b>Head teacher appraisal</b>  <b>Head teacher recruitment</b></p>			
<b>Additional standalone options:</b>		All prices TBC	
Governor hub		£200	
NGA membership		£240	
Learning Link		£110	
Modern Governor		£180	
OGA		£10-£15	
<b>Health &amp; Safety</b>	Maintained Schools	Nursery & Primary £4.83 per pupil Secondary £5.85 Special Schools £7.73	PAYGO Rates £550 per day
<b>Health &amp; Safety</b> <i>continued</i>	Academy	Nursery & Primary £4.68 per pupil Secondary £5.85 Special Schools £7.73	PAYGO Rates £550 per day
		Conversion package £500-£2,500	Exact price POA contact <a href="mailto:jean.noonan@oxfordshire.gov.uk">jean.noonan@oxfordshire.gov.uk</a>
<b>OXSIT</b>	Package 1 Three Days	£1,575	
	Package 2 Four Days	£2,100	
	Package 3 Six days	£3,150	
	Package 4 ten days	£5,250	
	Package 5 12 days	£6,300	PAYGO Rates £550 per day £300 per Half day
<b>Performance and Information Service</b>	Primary Schools 1-100 pupils 100+	£295 £395	Bespoke Training POA



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