

## School Business Manager Briefing

**10 October 2018**

**Council Offices, 160 Tooley Street, London, SE1 2QH**

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Please report to the main reception desk on arrival and collect your visitor badge before joining us in conference room G02 on the ground floor. Refreshments will be available from 8:15am. There is a full agenda and the briefing will start promptly at 8:30am.

<b>08:15</b>	<b>Refreshments and sign in</b>
<b>08:30</b>	<b>Introduction</b> Julie Chow, Head of Schools Human Resources Dave Richards, Education Finance Manager
<b>08:35</b>	<b>Procurement and contracts for services</b> Steve Bishop, Lawyer (Contracts)
<b>09:05</b>	<b>Disclosure and barring checks and the HR training offer</b> Lisa Sertic, Human Resources Administrator
<b>09:15</b>	<b>TUPE procedures, pay and general HR update</b> Julie Chow, Head of Schools Human Resources
<b>09:40</b>	<b>Finance update</b> Dave Richards, Education Finance Manager
<b>10:10</b>	<b>School audits and the National Fraud Initiative</b> Paul Bergin, Senior Investigation Officer
<b>10:30</b>	<b>Questions and close</b>

**Map to the venue:** [Council offices, 160 Tooley Street](#)

**Future briefing dates:** 12 December 2018, 30 January 2019, 27 March 2019, 22 May 2019, 26 June 2019

**Booking via:** <http://schools.southwark.gov.uk/professional-development/leadership-and-management>

**Procurement and contracts for services** Steven Bishop, Lawyer (Contracts)

[steve.bishop@southwark.gov.uk](mailto:steve.bishop@southwark.gov.uk) 020 7525 7645

*Useful links:*

<http://www.southwark.gov.uk/schools-and-education/school-management/maintained-schools-contractual-issues>

<https://www.gov.uk/government/publications/deals-for-schools/deals-for-schools>

<http://exorms.co.uk/home/>

**Disclosure and Barring Services** Lisa Sertic, Human Resources Administrator

[lisa.sertic@southwark.gov.uk](mailto:lisa.sertic@southwark.gov.uk) 020 7525 5307

*Useful links:*

<https://www.gov.uk/government/collections/dbs-referrals-guidance--2>

[https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/550197/Regulated\\_activity\\_in\\_relation\\_to\\_children.pdf](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/550197/Regulated_activity_in_relation_to_children.pdf)

**TUPE procedures and HR update** Julie Chow, Head of Schools Human Resources

[julie.chow@southwark.gov.uk](mailto:julie.chow@southwark.gov.uk) 020 7525 0050

*Useful links:*

<http://schools.southwark.gov.uk/schoolshr>

**Finance update** Dave Richards, Schools Finance Manager

[Dave.richards@southwark.gov.uk](mailto:Dave.richards@southwark.gov.uk) 020 7525 3733

**School audits and the national fraud initiative** Paul Bergin, Senior Investigation Officer

[Paul.bergin@southwark.gov.uk](mailto:Paul.bergin@southwark.gov.uk) 020 7525 1261

Reporting fraud and phishing emails: [hotline.fraud@southwark.gov.uk](mailto:hotline.fraud@southwark.gov.uk)

Turnaround time for audit reports: 2-3 weeks from visit

# School Finance

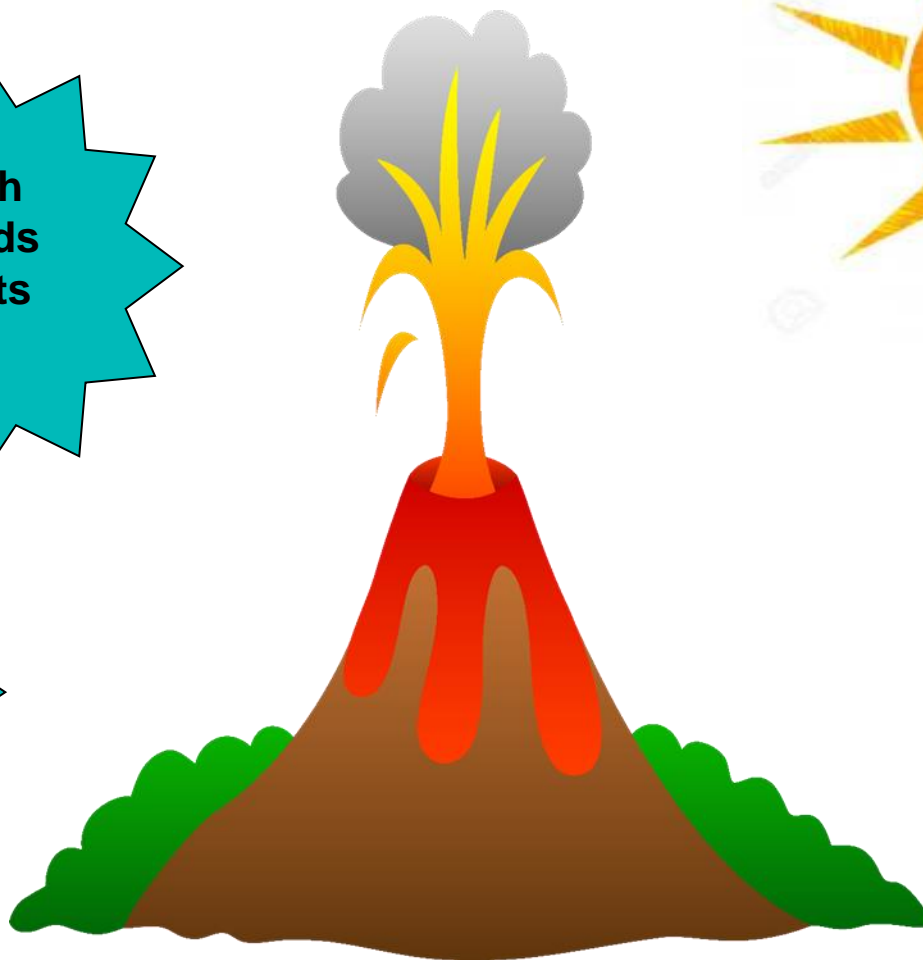
Dave Richards, Schools Finance Manager

10 October 2018

# Financial Update

**High  
Needs  
costs**

**Pension  
Costs**



**Teachers  
Pay  
Grant**



# Teachers Pay Grant

Type of School	Rate in 2018 to 2019	Rate in 2019 to 2020
	£	£
Primary schools	19.51	33.65
Secondary schools	31.57	54.20
Special and alternative provision schools	78.10	134.97

<b>Teachers Pay Grant</b>	<b>2018/19</b>	<b>2019/20</b>
	<b>£</b>	<b>£</b>
<b>210 Primary Pupils</b>	<b>4,100</b>	<b>7,100</b>
<b>420 Primary Pupils</b>	<b>8,200</b>	<b>14,100</b>
<b>630 Primary Pupils</b>	<b>12,300</b>	<b>21,200</b>
<b>600 Secondary Pupils</b>	<b>19,000</b>	<b>32,000</b>

# **School Business Managers Working Group**

- BACS — two stages
- Closing the Accounts
- High Needs Adjustment
- Early Years Adjustment

# **Schools Forum**

- Funding Formula
- Growth Fund
- Falling Rolls
- De-delegated Funding (Summerhouse, trade union, trade union, maternity)
- High Needs Sub-group
- Early years



# Human resources update

October 2018

 @lb\_southwark

 facebook.com/southwarkcouncil



# TUPE or not TUPE...?

- Updated guidance issued May 2018
- Need to pick up TUPE in procurement procedures
- Impact on employment and pension
- Aware of 14 potential / actual TUPE transfers in progress
  - Outsourcing
  - Insourcing
  - Change of service provider
  - Academy conversion

<http://schools.southwark.gov.uk/schoolshr/workforce-planning>

# Reorganisations

- **Updated reorganisation procedure** (March 2018)
  - Adoption on or before 1 September 2018
  - Simple, 4 step approach
  - New suite of supporting documents
  - Aware of 9 reorganisations in progress or planned
  - New website area

<http://schools.southwark.gov.uk/schoolshr/workforce-planning/reorganisation-redeployment-and-redundancy>

# Teachers' pay

- **Teachers' pay** (for September 2018)
  - Consultation on national pay award and STPCD closed 3 September
  - DfE response unchanged
  - STPCD published along with updated guidance
  - Pay policy updated and pay ranges agreed with unions 20 September.
  - Published to schools 21 September 2018
- Uplift::
  - 3.5% uplift to main pay range and unqualified pay range
  - 2% uplift to upper pay range and leading practitioner pay range
  - 1.5% uplift to leadership pay range and school group ranges
  - 2% uplift on all allowances

<http://schools.southwark.gov.uk/schoolshr/news-and-views-2018>

<http://schools.southwark.gov.uk/schoolshr/pay-and-conditions>

# Support staff pay

- **Support staff pay negotiations** (for 1 April 2019)
  - National rates were agreed for 2018 – 2020
  - Published Southwark 2018 pay range
  - Published national agreement for 2019

<http://schools.southwark.gov.uk/schoolshr/pay-and-conditions>

- From 2019:
  - Minimum 2% uplift
  - Even increments of 1.8% up to point 28
  - National pay ranges condensed at lower levels
  - Consultation underway on how to apply this to Southwark pay framework

# Apprenticeships

- **Levy fund – use it or lose it...**
  - Covers costs of training
- **Apprenticeship frameworks**
  - Teaching assistants
  - Early years
  - School business manager
  - Finance and administration
  - Premises and facilities
  - Catering
  - Nursing associate
  - Post-graduate teacher

<http://schools.southwark.gov.uk/schoolshr/workforce-planning/apprentices>

# HR audits

- Updated documents
  - Introduction to the HR audit (new)
  - Audit template
  - Single central record guidance
  - Single central record template
  - Workforce equalities monitoring (includes gender pay gap)
- New website area:

<http://schools.southwark.gov.uk/schoolshr/policies-and-procedures/human-resources-audits>

# Employment checks

- **Keeping Children Safe in Education** (1 September 2018)
- Governors in maintained schools subject to section 128 check
- In addition to enhanced DBS check (and barred list check where required)
- Check is undertaken by the school using the secure access portal

<https://teacherservices.education.gov.uk/>

- **Childcare Disqualification Regulations** (31 August 2018)
- 'Disqualification by association' no longer applies in schools
- Individual disqualification still applies
- Confidential declaration form updated

<http://www.legislation.gov.uk/ukxi/2018/794/contents/made>

<http://schools.southwark.gov.uk/schoolshr/news-and-views-2018>



# DBS updates

- **DBS checks for governors and volunteers**
  - DBS checks for school governors no longer include a barred list check
  - For governors who are also engaged in a regulated activity free of charge barred list checks can be carried out on request
  - Other volunteers not in regulated activity should choose the job title “Teaching Asst (Non-Regulated)”
  - When requesting a barred list check please indicate:
    - Last name
    - Date of birth
    - Nature of regulated activity
- **Paper DBS privacy policy**
  - Paper DBS applications now require a signed privacy declaration
  - Emailed to schools and available from HR on request

# Training offer 2018/19

- **Workshops**

- Accredited safer recruitment – full day *9 November*
- Contracts of employment – half day *12 December*
- Effective recruitment and induction – half day *13 November*
- Introduction to human resources – 2 hours *26 November*
- Managing staff attendance – half day *5 October*
- Reorganising your staffing structure – half day *Waiting list*
- Teachers appraisal and pay – half day *3 July*
- Head Teacher appraisal and pay – 2 hours *17 October*

- **Briefings and updates**

- New head teacher induction
- New governor induction
- Head Teacher and School Business Manager breakfast briefings

<http://schools.southwark.gov.uk/schoolshr/training-development>

# Contact us

- Website:
  - <http://schools.southwark.gov.uk/schoolshr>
- Regular news articles:
  - <http://schools.southwark.gov.uk/schoolshr/news-and-views-2018>
- Contact the team:
  - <http://schools.southwark.gov.uk/schoolshr/contact-us>
- Julie Chow, Head of Schools Human Resources
  - 020 7525 0050 / 07841 867 956
  - [Julie.chow@southwark.gov.uk](mailto:Julie.chow@southwark.gov.uk)

# School Business Manager Briefing

## Human Resources training offers

Have you visited our new website area yet? <http://schools.southwark.gov.uk/schoolshr/training-development> All of our briefings, workshops and other presentations in one place. Download our full event calendar or browse through the courses available to help you feel confident in your role.

### Training and development

[Article view](#)[Page resources](#)

#### Human resources briefings, workshops and more

To ensure that you have the information, knowledge and skills to manage your workforce effectively, we run a regular schedule of training for our schools about topical human resources issues. Our training will support you to implement our policies and procedures confidently and signpost you to valuable resources and contacts for further advice. Session contents are updated regularly to reflect changing legislative requirements, local and national developments and initiatives. Additionally, they offer an opportunity to network and share experience and knowledge with your peers and other professional colleagues. At your request we have incorporated some new workshops into our offer for the coming year.

Our traded schools benefit from discounted rates on our events and all schools and related organisations are welcome to attend.

We also present at regular briefings for governors, school leaders and other school staff during the year. Our event calendar below summarises all of our upcoming events. Full details of each workshop along with costs and booking information can be found in the menu on the right.



We look forward to welcoming you to an event soon. If you have any questions or suggestions for future topics please contact [Lisa.sertic@southwark.gov.uk](mailto:Lisa.sertic@southwark.gov.uk) or [Sade.williams@southwark.gov.uk](mailto:Sade.williams@southwark.gov.uk).

#### In this article

##### Training and development

[Contracts of employment](#)[Effective recruitment and induction](#)[Governors' induction programme](#)[Head Teachers' breakfast briefings](#)[Head Teacher appraisal and pay](#)[Introduction to human resources](#)[Managing staff attendance](#)[Reorganisation your staffing structure](#)[Safer recruitment training](#)

#### Coming up...

Date	Topic and duration	Recommended to
17 October 2018	Head Teachers' appraisal and pay – 2 hours (evening)	Governors and governor reviewers.
7 November 2018	New governors' induction – 2 hours (evening)	School governors new to the borough or new to governance.
9 November 2018	Accredited safer recruitment – full day	All school staff involved in recruitment.
13 November 2018	Effective recruitment and induction – half day (morning)	School leaders, selection panels, school business managers and others involved in recruiting and inducting staff.
14 November 2018	Head Teacher breakfast briefing – 2 hours (morning)	School leaders.
26 November 2018	Introduction to human resources – 2 hours (morning)	School business managers and their office teams. <i>This briefing is provided free of charge to our traded schools.</i>
12 December 2018	School Business Manager breakfast briefing – 2 hours (morning)	School business managers.

<b>Date</b>	<b>Topic and duration</b>	<b>Recommended to</b>
12 December 2018	Contracts of employment – 3 hours (follows SBM breakfast briefing)	School business managers and others involved in producing and issuing contracts of employment.
23 January 2019	Head Teacher breakfast briefing – 2 hours (morning)	School leaders.
30 January 2019	School Business Manager breakfast briefing – 2 hours (morning)	School business managers.
8 February 2019	New governors' induction – 2 hours (morning)	School governors new to the borough or new to governance.
28 February 2019	Accredited safer recruitment - full day	All school staff involved in recruitment.
13 March 2019	Head Teacher breakfast briefing – 2 hours (morning)	School leaders.
22 March 2019	School Business Manager breakfast briefing – 2 hours (morning)	School business managers.
22 May 2019	School Business Manager breakfast briefing – 2 hours (morning)	School business managers.
23 May 2019	New head teacher induction – half day (afternoon)	New head teachers and head teachers new to the borough.
5 June 2019	Accredited safer recruitment - full day	All school staff involved in recruitment.
6 June 2019	New governors' induction – 2 hours (morning)	School governors new to the borough or new to governance.
19 June 2019	Head Teachers breakfast briefing – 2 hours (morning)	School leaders.
21 June 2019	New governors' induction – 2 hours (morning)	School governors new to the borough or new to governance.
26 June 2019	School Business Manager breakfast briefing – 2 hours (morning)	School business managers.
3 July 2019	Teachers' appraisal and pay – half day (afternoon)	School leaders and their teams and anyone involved in the teachers' appraisal process.
Waiting list	Reorganising your staffing structure – half day	School leaders, governors, finance and business managers involved in supporting changes in your school.

# The essentials of teachers' pay and conditions – what you need to know - 8 November 2018

Thursday 8 November 2018

18 Smith Square, Westminster, London SW1P 3HZ

LGA members and workforce subscribers £199 +VAT, non-members £345 + VAT

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This one-day training event on 8 November is suitable for anyone relatively new to schools' HR whose work involves advising schools on workforce issues, whether within local authority schools' HR services, multi-academy trusts, co-operatives and mutuals or commercial organisations.

Key topics include:

## Pay

- Pay framework including salary safeguarding
- Performance management including the link with pay

## Terms and conditions

- Working time
- Sickness and maternity benefits
- Notice and terminations
- Continuous service

This event will be of interest to: schools' human resource professionals and apprenticeships in local authorities, multi-academy trusts and standalone academies and outsourced and private sector organisations; school support staff and governors, finance and payroll managers with an interest in schools' pay and conditions.

Other similar events are planned.

Further details of all LGA's events can be found on [our website](#)

**Maintained** schools can benefit from the LGA members' rate by booking via [Lisa.sertic@southwark.gov.uk](mailto:Lisa.sertic@southwark.gov.uk) ASAP. Places are strictly limited so early booking is recommended to secure your place.

Bookings can be made directly through the LGA website but will be charged to schools at the non-member rate.