



NORTH YORKSHIRE SCHOOLS FORUM

Date of meeting:	Wednesday, 13 November 2019
Title of report:	North Yorkshire Teachers' and Support Staff Associations – Professional Associations Facilities Arrangements (PAFA)
Type of report: Delete as required	For information only
Executive summary: Including reason for submission	This report provides an option for Schools Forum to continue to de-delegate funding for PAFA for 2020-21 and provides an update on progress towards a traded model
Budget / Risk implications:	Potential risk to services and resources for schools from April 2020
Recommendations:	As per section 5, to continue to de-delegate services for PAFA for 2020-21
Voting requirements:	LA maintained primary and secondary schools only (in relevant phase)
Appendices: To be attached	Action Plan attached
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Presenting officer: If not the originator	

**North Yorkshire Teachers' and Support Staff
Associations – Professional Associations Facilities
Arrangements (PAFA)****1.0 PURPOSE OF THE REPORT**

1.1 This is a brief report as agreed at the Schools' Forum meeting on 26th September 2019 with regard to the progress made in relation to:

- The decisions made by Schools' Forum on 6th December 2018.
- As background for a vote by the Schools' Forum to de-delegate the Fund for a further year.
- The progress of the actions to be taken to achieve a fully traded model from April 2021.

2.0 BACKGROUND

2.1 Interested parties have been concerned about the name of the service for some time and as a result the name is about to change from the PAFA to Trade Union Support for Schools.

2.2 At the September meeting we were asked to include a summary of the work of the PAFA in the last year. In the last 12 months Local Union Representatives such as the County Secretaries and their Casework Co-workers have been involved with the following:

- Collective consultation on policy developments with the NYCC CYPS and several individual MATS JCNCs.
- Collective consultation on reorganisation of SEND, School Improvement Service, Adult Learning Service.
- Collective consultation at school level with regard to redundancy, reorganisation and federation.
- Collective consultation at TUPE consultation meetings and academy conversions.
- Individual casework relating to the following policies and situations; Salary Reviews, Attendance Management, Disciplinary Procedure, Developing Performance, Capability, Flexible Working, Without Prejudice conversations, Resolving Issues at Work and Grievance.
- Advising many members via telephone conversations which are often well after normal working hours.

All these functions take place in North Yorkshire which is the largest county in the UK.

3.0 STRATEGY

3.1 An action plan is attached showing the actions to be taken to achieve a fully traded model.

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3.2 The updated plan shows who is to carry out the actions and those which have been completed.

3.3 To reiterate - the aims are:

- to ensure all schools are aware of the benefits of buying into PAFA – one charge per annum enables them to meet their obligations to provide facilities for representation of their staff both teaching and support staff;
- to ensure all schools buy into the arrangements (at least 90% to be in line with the forecast);
- The per pupil amount is sufficient to ensure the resources are available to operate the service;
- To enable the setting of a balanced budget.

4.0 PROGRESS

4.1 The deficit for 2018/19 was £64,232. This is made up as follows:

2018/19 Actual Position:

	£
Teaching Pay	134,429
Unison Pay	32,500
Pay Total	166,929
DSG Funding	(69,000) - Based on 52,762 LMS pupils @ £1.31
Academy/MAT Fees	(33,697) - Based on 23,564 Academy pupils @ £1.43
Funding Total	(102,697)

Pay Total less Funding Total **£64,232 – Deficit**

2019/20 Forecast Position:

	£
Teaching Pay	127,164
Unison Pay	32,500
Pay Total	159,664
DSG Funding	(127,000) - Based on 47,174 LMS pupils @ £2.70
Academy/MAT Fees	(61,467)
Funding Total	(188,564)

Pay Total less Funding Total **(£28,803) – Surplus**

4.2 Following a further meeting of the Professional Associations in October:

- The PAFA/Trade Union Support for Schools flier is being updated.
- The PAFA/Trade Union Support for Schools webpage is being updated in line with recent changes both to the NYES online presentation known as 'the Store' and Local team changes.

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4.3 Following changes to the team and an update of costs the forecast surplus has increased to £28,803 for this financial year.

4.4 Comparison of the NYCC rate with other neighbouring Local Authorities

Northumberland £3.30 from April 2018

Cumbria £5.70 per pupil

Leeds £5.50 per pupil.

Bradford £5.26 per pupil

Kirklees £5.72 per pupil

Wakefield £5.70 per pupil

Calderdale £2.32 per pupil

5.0 RECOMMENDATIONS

5.1 As the balance sheet above shows, as a result of the Schools' Forum decision last December, to continue to de-delegate funding for the service and increase the charge to £2.70, we have produced a surplus and therefore seen the original deficit reduced by between a third and a half. If the situation remains unchanged then the deficit is predicted to disappear by March 2022.

5.2 We continue to plan with LA officers to be ready to be fully traded service if necessary.

5.3 Following on from discussions at the September Schools' Forum we would like to ask that members of Schools' Forum vote to de-delegate this fund for a further year 2020/21

5.4 We would like to ask that Schools' Forum agree to a charge of £2.79 per pupil for the year 2020/21 which is in line with increasing inflationary cost. On projected information this would enable a surplus of up to £24,202 for the year 2020/21.

5.5 We would like the Schools' Forum to agree to extending the repayment of the deficit over a third year. On current experience and forecast this would enable:

- The deficit to be repaid in 3 years.
- No negative impact of the functioning of the service in 2020/21.
- A small rise of 9p per child to schools for 2020/21.
- Further time to understand the Government's future plans for this type of service.
- A third year to compensate for any unplanned surplus or deficit.

STUART CARLTON

Corporate Director – Children and Young People's Service

PAFA Strategic Action Plan towards a fully traded model from April 2020 (*updates for SF 13.11.19 in italics and highlighted in pink*)

	Task	By Whom	By when	Notes on progress
1.	Report periodically to the Schools' Forum on progress with actions in the plan Reports to be ready 10 days in advance of the meeting dates or other such dates as required.	Chris Head and Panel secretary	14.03.19 23.05.19 26.09.19 13.11.19 12.12.19	Report ready for 14.03.19 Report ready for 26.09.19 <i>Report ready for 13.11.19 will include how TU use facilities fund, consideration of rolling deficit over for third year and continue de delegation</i>
2.	Articles in HR newsletters between now and March 2020 highlighting different benefits (drip, drip effect) to ensure schools know about PAFA	Mairi Reed & HR department	As and when the newsletters come out throughout the year	First article appeared in January newsletter HR will also follow up with emails and social media posts to achieve max buy in
3.	What is the budget required to operate the facilities arrangements?	Fu Wing Lee	March 2019	Question asked Budget report for 3.09.19 showed fund in surplus for 2019/20. If de delegation continues this positive outcome could be replicated for a further year
4.	Decide the per pupil amount based on agreed pupil numbers which generates a realistic budget sum based on previous take up	County secretaries and Fu Wing Lee/ Finance officers	March 2019 and then part of budget setting process – costings for 2020 needed by 26.09.19	Question asked Budget and projected income and expenditure supplied by Fu for 2020 <i>Further modelling provided and suggested £2.79 pp</i>
5.	Determine what would happen to any surplus budget if there is greater take up than anticipated and required to operate without a deficit	LA officers	Decision as soon as possible	
6.	Review the distribution of the PAFA budget amongst all the PAs including Unison	County secretaries	March 2019	On agenda for March 29 th <i>Meeting 14.10.19 agreed 80/20 split</i>
7.	Make a “business case” for PAFA to persuade schools of benefits	Panel secretary, Chris Head & Chris Knowles	March/April 2019 refined ready for Autumn term	Completed and used for Flyer and website
8.	Review wording on NYES web page which gives due prominence to support staff as well as teachers Complete the information gathering template supplied by NYES	Panel secretary & Chris Head	ASAP 16 th September	Business case NYES is redesigning webpages for all traded services Completed

9.	Flyer wording which describes positively the value of buying in (summary of business case) The PAs to agree the final wording of the flyer ready for printing if that is necessary but in any case to be used when academisation takes place to further advertise the service	Panel secretary & Chris Head	July ready for September	Further meeting between C Head and A Swift to briefly outline positive benefits presented to meeting 3.09.19. NYES will further refine and draft a flyer Final version will be signed off in September/October
10.	Agree the buy in date if possible for academies and maintained schools	Finance officers to advise	Ready for April 2020	Greater commonality of buy in dates is emerging
11.	Attend leadership networks – have a stall, flyers and short presentation	Chris Head and Anne Swift	Attend Autumn & Spring networks	Dates for meetings have been obtained – <i>not necessary to attend Autumn meetings</i>
12.	Attend bursar/business managers networks – have a stall, flyers and short presentation	Chris Head and Anne Swift	Attend Autumn & Spring networks	<i>Chris Head and Anne Swift will attend Spring meetings if required</i>
13.	Brief “relationship managers” on benefits of PAFA	Chris Head & LA officers	Throughout Summer term 2019	NYES have committed to do this ready for Autumn visits and will ensure staff promote facilities very positively
14.	Postcard with brief bullet point benefits to give out at networks & relationship managers to leave in schools	Panel secretary & Chris Head	Completed	To consider on 29 th March – Completed
15.	Develop follow up material for any schools which don't buy in <ul style="list-style-type: none"> Suitable letter to HT Compile case studies showing costs of tribunals if representation is not provided Letter/flyer for members Poster for Staffroom noticeboard 	Chris Head & Paul Busby PA secretaries to provide examples Chris Head & Paul Busby Spencer Williams	Completed These are available Completed In hand	All considered at meeting 29 th March
16.	Consider charging consultancy fees for establishments not buying <ul style="list-style-type: none"> What rate Invoicing Claiming Pay roll /PAYE/NI etc – any admin fee Verifying claim 	Panel secretary	Summer term	Agreed that these strategies might deter establishments from “buying in” so not pursued
17.	Set the per pupil amount for 2020/21 based on modelling by Fu Wing	Fu Wing and considered by PAs	Complete by November	Initial consideration at meeting 3.09.19 <i>Agreed £2.79 by PAs (14.10.19)</i>

18.	The PAs agreed to consider a name for the arrangements which are more easily understood by schools and emphasises the support available to schools to meet employment obligations in an efficient, effective and economic manner	NYES to prepare some options	Ready for launch of updated website – Store	<i>Agreed to rename PAFA as Trade Union Support for Schools</i>
19.	<i>Pursue the remaining Trusts who have yet to pay in to join the scheme as soon as possible</i>	Chris Head and PAs	ASAP	