

<b>Date of meeting:</b>	Thursday, 21 May 2020
<b>Title of report:</b>	Trade Union Support for Schools (TUSfS) (Previously Professional Associations Facilities Arrangements - PAFA)
<b>Type of report:</b> Delete as required	For information only
<b>Executive summary:</b> Including reason for submission	A progress report on the actions to be taken to achieve a fully traded model possibly from April 2021
<b>Budget / Risk implications:</b>	None
<b>Recommendations:</b>	To note the contents of the report
<b>Voting requirements:</b>	N/A
<b>Appendices:</b> To be attached	N/A
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<b>Presenting officer:</b> If not the originator	

## 1.0 PURPOSE OF THE REPORT

1.1 This is a brief report as agreed previously at the Schools' Forum with regard to an update on the progress made in relation to;

- The decisions made by Schools' Forum on 6<sup>th</sup> December 2018 and 13<sup>th</sup> November 2019.
- The progress of the actions to be taken to achieve a fully traded model possibly from April 2021.

## 2.0 BACKGROUND

2.1 The name of the service is now Trade Union Support for Schools (TUSfS previously PAFA).

2.2 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.

Since the 23<sup>rd</sup> March and in compliance with the COVID-19 lockdown, Union Representative have been working remotely from home and involved in additional video conferences with the LA and MATs.

## 3.0 STRATEGY

3.1 An action plan is attached and continues to show the actions to be taken to achieve a fully traded model should it be required.

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

(Trade Union Support for Schools (TUSfS))

3.3 To reiterate - the aims are

- to ensure all schools are aware of the benefits of buying into TUSfS – 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.
- 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	<b>£64,232 – Deficit</b>

2019/20 Actual Position

	£
Teaching Pay	124,790
Unison Pay	32,500
Pay Total	157,290
DSG Funding	(127,000) - Based on 47,174 LMS pupils @ £2.70
Academy/MAT Fees	(83,930) - 36 Academies/MATs
Funding Total	(210,930)
Pay Total less Funding Total	<b>(£53.640) – Surplus</b>

2020/21 Forecast Position

	£
Teaching Pay	145,243
Unison Pay	32,500
Pay Total	177,743
DSG Funding	(112,476) - Based on 40,314 LMS pupils @ £2.79
Academy/MAT Fees	( 94,126) - Estimate on 33,737 pupils @ £2.79
	<b>(79,967 1/5/20)</b>
NYES fee	4,449
Funding Total	(202,153)
Pay Total less Funding Total	<b>(£24,410) – Surplus</b>

**(Trade Union Support for Schools (TUSfS))**

## 4.2 In addition

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

## 4.3 Following further changes to the team and an update of costs the forecast surplus has increased to £24,410 for this financial year 2020/21.

## 4.4 As indicated previously - 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 £5.72per pupil

Wakefield £5.70 per pupil

Calderdale £2.32 per pupil

5.0 SUMMARY

## 5.1 As the balance sheet above shows, as a result of the Schools' Forum decision in December 2018, to continue to de-delegate funding for the service and increase the charge to £2.70 and then again in November 2019 to £2.79, we have produced a surplus and therefore seen the original deficit reduced by between a third and a half in the first year. If the situation remains unchanged then the deficit is predicted to disappear by March 2022, however, a third year may not now be needed to clear the deficit.

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

## 5.3 The buy in of academies remains high;

- There has been an increase in MATs buying for all their academies in one lump sum.
- As of 1<sup>st</sup> May 2020, there has been a 9.78% increase in revenue from the TUSfS trading arm compared to the entire 2019/20 income. This total was £79,967.
- Most academies are now buying into the service in March for the next financial year which aids financial planning.
- There continues to be a positive development of the relationship of all education employee professional associations within the TUSfS.
- We continue to wait to understand the Government's future plans for this type of service.
- Future panning for succession and pricing needs to focus on the involvement of colleagues with a teaching contract.

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 21.05.20 in italics and highlighted in yellow*)

	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 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>Report ready for 21.05.20 highlighting reduction in deficit and surplus under continued 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 2018/19. If de delegation continues this positive outcome could be replicated for a further year <i>Surplus predicted but this is based mainly on staff paid at APTC not at STPCD rates</i>
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 Further modelling provided and suggested £2.79 pp <i>Based on £2.79pp for 20/21 budget deficit is removed</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 <sup>th</sup> Meeting 14.10.19 agreed 80/20 split

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 <sup>th</sup> 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 – not necessary to attend Autumn meetings
12.	Attend bursar/business managers networks – have a stall, flyers and short presentation	Chris Head and Anne Swift	Attend Autumn & Spring networks	Chris Head and Anne Swift will attend Spring meetings if required <i>Not necessary to attend Spring meetings as de delegation for 20/21 agreed</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 <sup>th</sup> March – Completed
15.	Develop follow up material for any schools which don’t buy in <ul style="list-style-type: none"> <li>• Suitable letter to HT</li> <li>• Compile case studies showing costs of tribunals if representation is not provided</li> <li>• Letter/flyer for members</li> </ul>	Chris Head & Paul Busby  PA secretaries to provide examples  Chris Head & Paul Busby	Completed  These are available  Completed  In hand	All considered at meeting 29 <sup>th</sup> March

	<ul style="list-style-type: none"> <li>Poster for Staffroom noticeboard</li> </ul>	Spencer Williams		
16.	<p>Consider charging consultancy fees for establishments not buying</p> <ul style="list-style-type: none"> <li>What rate</li> <li>Invoicing</li> <li>Claiming</li> <li>Pay roll /PAYE/NI etc – any admin fee</li> <li>Verifying claim</li> </ul>	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 Agreed £2.79 by PAs (14.10.19)
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.	Pursue the remaining Trusts who have yet to pay in to join the scheme as soon as possible	Chris Head and PAs	ASAP	<i>As of April 2020 the vast majority of Trusts had bought into the TUSfS for 20/21</i>
20.	<i>Contact new head of commercial arm of NYES</i>	<i>Chris Head</i>	<i>Upon appointment in Spring 2020</i>	<i>Completed</i>
21.	<i>Write an “SLA” for the new website “Store” to illustrate the benefits of TUSfS</i>	<i>Anne Swift and Chris Head</i>	<i>Jan 2020</i>	<i>Completed</i>
22.	<i>Update the flyer and page of the Store website</i>	<i>Chris Head and head of NYES</i>	<i>Spring 2020</i>	<i>Completed</i>
23.	<i>Set up a system which can be easily updated, whereby the Trade union reps can quickly see which Trusts and individual schools have bought in and are therefore entitled to the service</i>	<i>Anne Swift</i>	<i>Spring 2020</i>	<i>Completed</i>
24.	<i>Consider appropriate per pupil amount for 21/22 which keeps the budget in balance and allows the release of staff at STPCD rates</i> <i>Modelling of a variety of PP amounts and % buy in by MATs</i>	<i>Chris Head and PAs</i> <i>Fu Wing Lee</i>	<i>Summer 2020 in Preparation for Autumn</i>	