



NORTH YORKSHIRE SCHOOLS FORUM

Date of meeting:	Thursday, 21 November 2024
Title of report:	School Funding; De-Delegation 2-25-26 Facilities Trade Unions and LA joint report
Type of report: Delete as required	For decision
Executive summary: Including reason for submission	<p>This report seeks approval for continued de-delegation of funds to support local trade union facilities arrangements.</p> <p>It follows on from reports in November 2021, May 2022, November 2022 and November 2023 outlining work to model increases to the traded Trade Union Facilities Time charges in order to provide sufficient 'release' time for locally elected representatives.</p> <p>Due to challenges in the unions securing local representatives in North Yorkshire last year and a resultant surplus balance, no increase to per pupil rates was proposed for 2024-25.</p> <p>A combination of (i) the 2024-25 rate freeze, (ii) unions having secured local representatives at a rate more in line with allocations (iii) above average pay awards in recent years, the facilities budget needs to be increased in order to mitigate the negative impact on the pooled facilities allocations.</p>
Budget / Risk implications:	Increase in de-delegated costs
Recommendations:	<p>To:</p> <ul style="list-style-type: none"> - continue to support the principle of de-delegation of funds for maintained schools - Following a rate freeze in 2024-25, agree to an increase of £0.50 for 2025-26, equating to £3.94 per pupil.
Voting requirements:	LA maintained schools members only (by phase)
Appendices:	None



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To be attached	
Report originator and contact details:	<p>Mairi Reed, Principal HR Adviser Mairi.reed@northyorks.gov.uk</p> <p>Supported by a working group of all recognised teaching trade unions and finance.</p>
Presenting officer: If not the originator	<p>A representative of the teaching unions supported by Mairi Reed, Principal HR Adviser</p>

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1.0 PURPOSE OF THE REPORT

To seek approval for the continued de-delegation and increase of funds for the 2025-26 financial year to support local trade union facilities arrangements.

2.0 BACKGROUND

- 2.1 In summary, previous reports have set out the current challenge to address the inequity of release time and insufficient funds to support adequate release time in North Yorkshire. We know that North Yorkshire Council (NYC) has a comparatively low release time ratio as compared with other Authorities.
- 2.2. It has previously been agreed that the current arrangements for Unison would continue for de-delegated funds, with a contribution to corporate facilities arrangements (with provision made for cost of living increases). Otherwise, it was agreed that work would continue on financial modelling in order to work towards an incremental plan for increases and to 'level the playing field' to address any current inequity in release time for recognised teaching unions. This work would be undertaken in recognition of the fact that, each year, Schools Forum would still need to be asked to continue to support de-delegation and approve any proposed increase in costs for that particular year.
- 2.3 LA officers have continued to work with trade unions representatives on a regular basis with support from finance and agreed a set of principles to be observed in the financial modelling. As a reminder these are:
- **Principle 1** – cap on reimbursement at UPR3 plus on costs
 - **Principle 2** - Maximum increase in costs to schools to be capped at £0.50 per pupil including inflationary increases.
 - **Principle 3** – inclusion of 'handover days' where representatives change.
- 2.4 This work had been making good headway and unions had started to see an increase in the proportionate allocated release time available to them, on the basis of declared membership numbers in North Yorkshire.
- 2.5 Unfortunately, for a number of reasons, the 2023-24 financial year saw an unprecedented challenge across a large proportion of NYC's recognised unions in securing elected representatives. Following resignations from duties, some of the recognised unions had lower representatives than expected, or in some cases no representatives to claim against their allocation. This resulted in a projected surplus balance and so, last year Schools Forum were not asked to approve an increase in rates as per the original plan for incremental increases.

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- 2.6 Unions then made significant headway in increasing local representatives from January 2024 and into the 2024-25 financial year with some unions securing representatives for all of their allocation.
- 2.7 The last two years of pay settlements have seen significantly higher pay awards than those originally modelled in 2021.
- 2.8 A combination of 2.5 – 2.7 means that the original plan to incrementally increase trade union facilities time has suffered a set-back and, even with a proposed increase in facilities funding, if allocations for unions were to remain the same in 2025-26 as the 2024-25 allocations, the budget would be in a forecasted deficit of £115,400. Clearly this needs to be managed and so there needs to be some recalibration of the model in order to reset and remodel increases over time to achieve the original intention of increasing facilities time.
- 2.9 Unfortunately, it is clear that the 2025-26 year will need to see a **decrease** in current allocations in order to balance the budget, even if this budget is increased. Working group meetings are planned for early 2025 to agree revised and reduced allocations on a proportionate basis. To illustrate the impact, even with a maximum increase of £0.50 per pupil, the two main teaching unions are likely to see a decrease in their allocation of between 100 and 163 days. If a lower per pupil increase is applied then this will directly translate to an even more significant reduction in facilities time and more difficulty in achieving the longer term aim of increasing facilities time in North Yorkshire.
- 2.10 A £0.50 per pupil increase has been applied to Academies and this report seeks to achieve the same increase from de-delegated funds.

3.0 ADDITIONAL CONSIDERATIONS

- 3.1 Schools continue to face budgetary challenges and redundancy / restructuring work is increasing. Maintaining the stability of de-delegated facilities time for maintained schools will be important in ensuring that this predicted increased activity is appropriately supported by recognised unions.
- 3.2 With the continued trend for conversions to Academy status, the change to a model based on a formula protects against uncertainty as the amount of facility time for LMS will decrease commensurate with the number of union members in the schools leaving the local authority to become academies.

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4.0 RECOMMENDATIONS

4.1 Schools Forum is asked to:

- continue to support the principle of de-delegation of funds for maintained schools.
- Agree to an increase of £0.50 per pupil for the 2025-26 financial year in order to help mitigate the level of necessary reduction to facilities time which is counter to the overall long term aim of increasing this time. This follows a price freeze in 2024/25 and is a rise from £3.44 to £3.94 per pupil.

STUART CARLTON

Corporate Director – Children and Young People’s Service