



NORTH YORKSHIRE SCHOOLS FORUM

Date of meeting:	Thursday, 26 September 2019
Title of report:	Professional Associations Facilities Arrangements (PAFA)
Type of report: Delete as required	For information only
Executive summary: Including reason for submission	To update the Schools Forum on progress of the actions taken to achieve a fully traded model by April 2020
Budget / Risk implications:	To recover a deficit in the running costs of the Professional Associations Facilities Arrangements and ensure the arrangements are financially sustainable
Recommendations:	To note the contents of the report
Voting requirements:	N/A
Appendices: To be attached	Action Plan (attached)
Report originator and contact details:	Chris Head, NASUWT North Yorkshire Assistant County Secretary chrisheadnyfed@outlook.com
Presenting officer: If not the originator	

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 6th December 2018 with regard to the progress made in relation to;

- The decisions made by Schools' Forum on 6th December 2018
- The progress of the actions to be taken to achieve a fully traded model from April 2020.

2.0 STRATEGY

2.1 An action plan is attached showing the actions to be taken to achieve a fully traded model from April 2020.

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

2.3 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 80%);
- the per pupil amount is sufficient to ensure the resources are available to operate the service;
- to enable the setting of a balanced budget.

3.0 PROGRESS

3.1 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	135,395
Unison Pay	32,500
Pay Total	167,895

Professional Associations Facilities Arrangements (PAFA)

DSG Funding	(127,000) - Based on 47,174 LMS pupils @ £2.70
Academy/MAT Fees	(61,564)
Funding Total	(188,564)

Pay Total less Funding Total **(£20,669) – Surplus**

3.2 Following a further meeting of the Professional Associations and LA officers early in September;

- The PAFA flier is being updated ready for the school management team meetings in November.
- The PAFA webpage is being updated in line with recent changes both to the NYES on line presentation known as 'the Store' and Local team changes.

4.0 SUMMARY

4.1 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 a third. If the situation remains unchanged then the deficit is predicted to disappear by March 2022.

4.2 We continue to plan with LA officers to be ready to be fully traded service if necessary by April 2020.

4.3 There is still no word from the DfE or Government as to whether or not the process of de-delegation of centrally held budgets will change as of April 2020. As a result although we will be ready to, we will therefore not print the new flier unless required.

4.4 The charge per pupil for April 2020 is being considered at this time and any small increase will still maintain its very competitive position as compared to the other neighbouring Local Authority rates as already presented to Schools' Forum.

4.5 By the Schools' Forum December 2019 meeting, with more information from central Government, we will be able to further update the Forum as to the direction for April 2020.

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 26.09.19 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 <i>Report ready for 26.09.19 will include latest budget position and density of academy buy in to the arrangements</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 <i>HR will also follow up with emails and social media posts to achieve max buy in</i>
3.	What is the budget required to operate the facilities arrangements?	Fu Wing Lee	March 2019	Question asked <i>Budget report for 3.09.19 showed fund in surplus for 2018/19. If delegation continues this positive outcome could be replicated for a further year</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 <i>Budget and projected income and expenditure supplied by Fu for 2020</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>Further meeting arranged for September /October</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	<i>Completed and used for Flyer and website</i>
8.	Review wording on NYES web page which gives due prominence to support staff as well as teachers <i>Complete the information gathering template supplied by NYES</i>	Panel secretary & Chris Head	ASAP 16 th September	Business case <i>NYES is redesigning webpages for all traded services</i> <i>Completed</i>

9.	Flyer wording which describes positively the value of buying in (summary of business case) <i>The PAs to agree the final wording of the flyer ready for printing if that is necessary but in any case o be used when academisation takes place to further advertise the service</i>	Panel secretary & Chris Head	July ready for September	<i>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</i>
10.	Agree the buy in date if possible for academies and maintained schools	Finance officers to advise	Ready for April 2020	<i>Greater commonality of buy in dates is emerging</i>
11.	Attend leadership networks – have a stall, flyers and short presentation	Chris Head and Anne Swift	Attend Autumn & Spring networks	<i>Dates for meetings have been obtained</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</i>
13.	Brief “relationship managers” on benefits of PAFA	Chris Head & LA officers	Throughout Summer term 2019	<i>NYES have committed to do this ready for Autumn visits and will ensure staff promote facilities very positively</i>
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 – <i>Completed</i>
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	<i>Agreed that these strategies might deter establishments from” buying in” so not pursued</i>
17.	<i>Set the per pupil amount for 2020/21 based on modelling by Fu Wing</i>	<i>Fu Wing and considered by PAs</i>	<i>Complete by November</i>	<i>Initial consideration at meeting 3.09.19</i>

				<i>Will need to be agreed by November</i>
18.	<i>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</i>	<i>NYES to prepare some options</i>	<i>Ready for launch of updated website – Store</i>	