

TRADE UNION FACILITIES FINANCIAL YEAR 2018/19 AND 2019/20

Purpose of the Report

1. To report on the allocation of Trade Union Facilities funds for 2018 – 19 and 2019-20.
2. Propose a report be taken to the Special School Trust Board to seek approval for maintained special schools contributions to the scheme to be deducted at source to reduce the administrative burden for the 2020/21 financial year.

Information and Advice

3. The Schools Forum considered a report in October 2018 and supported a change to the de-delegation of trade union facilities funding in the 2019 – 2020 schools funding formula for maintained schools, excluding maintained special schools. This change was implemented April 2019 and has significantly and positively impacted on the efficient administration and management of the scheme.

The Nottinghamshire scheme, which meets the requirements of the DfE Guidance: Trade Union Facility Time in Schools (Ref DFE-00007-2014), ensures that all schools who contribute to the scheme can progress employee relations matters appropriately by providing access to locally elected accredited trade union representatives who can provide support and representation at hearings, appeals, consultation meetings and other employee matters. Schools (both maintained and academy) who do not contribute must make their own arrangements for trade union consultation and representation and liaise with Regional Trade Union Representatives. The current trade union facilities arrangements are as follows:

4. Financial Year 2018 -19

B/Fwd from 2017/18	£ 120,925.00
Schools Income 2018/19	£ 56,420.66
Academy Income 2018/19	£ 48,470.79
Budget Available 2018/19	£ 225,816.45
Late Expenditure 2017/18	£ 57,832.74
Expenditure 2018/19	£ 111,094.60
Total Expenditure	£ 168,927.34

C/Fwd to 2019/20	£ 56,889.11
Dedelegated Income	£ 64,840.00
Academy Income	£ 35,288.60
Expenditure 2018/19	£ -6,862.00
Budget Available 2019/20	£ 150,155.71

5. There are a number of academy schools have not as yet confirmed their intention to join the scheme for 2019/20 and there are a number of payments waiting to be processed, including a claim for a previous financial year. On this basis in conjunction with advice from the finance team and following discussions and agreement with the trade unions it is proposed that a prudent approach is to allocate £98,888 at this stage of the financial year.
6. The distribution of the budget to individual schools, trade union representatives and trade unions for the financial year 2018/19 is shown in Appendix A
7. All trade unions were asked to provide their current membership information to use as a basis for the distribution of the budget for 2019/20. However, as this information has not been received from all trade unions and had proved difficult for the newly amalgamated NUT and ATL it is proposed to allocate payments for 2019/20 on the historic formula as detailed below:

Trade Union	% Allocation	£ Allocation
NEU	34.4	£ 34,018.00
NASUWT	28.9	£ 28,579.00
NAHT	7.5	£ 7,416.00
ASCL	4.1	£ 4,054.00
Unison	22.4	£ 22,151.00
GMB	2.7	£ 2,670.00
Total	100	£ 98,888.00

It is proposed that more work be undertaken on this in order to consider future options for distribution based on more up to date membership numbers.

8. In order to allocate the above funding for 2019/20, the attached letter Appendix B was sent to the named secretaries of the recognised trade unions on 14 May 2019 with a request that they set out their representatives, allocation of funding based on FTE and their schools by 23 May 2019. This had previously been the subject of discussion with the recognised trade unions and an indicative allocation has been communicated on 2 May 2019. So far, no forms have been received.
9. There are currently 48 academy schools and 196 maintained schools (primary, special and secondary) buying into the trade union facilities scheme for the current financial year 2019/20.

10. The administrative procedures have been reviewed over the last year to ensure that the trade union representatives funded by the scheme only undertake trade union work in those schools who have paid their contribution. A list has been circulated to the trade union secretaries and updates will be provided should a maintained school leave the scheme and become an academy by the 31 August. Maintained school income is automatically transferred into the budget and all academy and special schools have now been billed. A budget reconciliation check will be undertaken in July.
11. The Trade union Facilities Agreement has been reviewed and agreed with the recognised trade union and the document is attached for information as Appendix C.
12. A Further report to be made available to the Schools Forum in either September or December 2019.

RECOMMENDATION/S

That the Schools Forum:

- 1) Note the financial contents of the report
- 2) A report be taken to the Special School Trust Board to seek approval for maintained special schools contributions to the scheme to be deducted at source.

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