

West Berkshire Council Maintained Schools

Proposal to De-Delegate Formula Funding 2017-18

Trade Union Representation Service

Outline of Proposed Service 2017/18

West Berkshire Council has a school trade union facilities agreement which includes provision for compensating individual schools for release time for teacher trade union representatives they employ. Compensation is paid from the dedicated schools grant (DSG).

Union representatives attend joint consultation meetings with the authority and meetings with head teachers and HR on a variety of employee relations matters. The latter includes TUPE consultation meetings where schools converted to academy status; consultation on reorganisations of teaching and support to staff (note: NASUWT and ATL also represent non teaching staff; NUT only represents teachers); disciplinary issues; grievances; ill health cases; capability cases; and settlement agreements.

What union officers do

Union officers use 'facilities time' to work with members experiencing professional difficulties (casework) and to support groups of members either in individual schools or through negotiation and consultation with the local authority acting on behalf of its schools (collective work). The casework dealt with by union officers falls into two broad categories: individual issues and collective issues.

Individual casework issues

The union officers spend most of the facilities time dealing with members. Union members in West Berkshire schools are able to contact their union representative directly by email or telephone. Issues raised by members in this way are known as casework. Casework can be divided into capability; disciplinary; grievance; and contracts, pay and conditions

Advice is often given on how the teacher can seek to resolve the matter for themselves. However, there are a number of cases where the union officer has to make contact with school management, human resources providers or an LA officer directly. Employees are entitled to be accompanied by a union officer at formal meetings under school HR procedures.

Contracts, Pay and Conditions issues such as pay determination appeals and questions of what teachers can be directed to do are becoming increasingly common.

Collective Issues

These include consultation on changes to working conditions such as pay policies, sickness absence policies, codes of conduct restructuring and redundancy. This school year has seen an increase in the number of school restructurings accompanied by the risk of redundancy, as school budgets come under increasing

pressure. The redundancy procedure is complex and often involves multiple meetings. The threat of redundancy can quickly undermine morale in a school and often the role of union officers is to reassure and support employees as well as ensuring that correct procedures are followed.

Benefits of Service

The following data gives information on the level and types of support provided in 2015/16:

Number of contacts made to/by union officers in 2015/16

Casework	Email	Phone	In person	Meeting
Capability Issues ¹	26	12	11	6
Pay & Conditions	19	7	4	3
Contracts	4	3	0	1
Disciplinary Issues	5	5	3	2
Grievance	4	6	1	1
Redundancy**				20
Restructuring**				8
TOTAL	58	33	19	41

Collective	In Person
LA Meetings ²	27**
Del Train	9
Personal	
Receive Train	14
Research	Not recorded
Union Briefing	15

¹ Includes formal support through appraisal

² Such as Joint Consultative Panel and Education Liaison meetings.

** Number of attendances. Officers of several unions are normally present at each meeting

Notes

This is hierarchical, i.e. an email that leads to a meeting is not recorded.

Email: number of members supported by an exchange of emails

Phone: number of members supported through at least one phone call.

In person: number of members with whom an officer has met at least once

Meeting: number of members supported at a meeting with management.

Hearing: number of members supported at a hearing

Officers also spend time on internal union organisation such as attending, committee and general meetings. These activities are not undertaken in 'facilities time' Each union has a support infrastructure for its officers that includes reference resources as well as briefings and training courses included above.

Proposed Cost of Delivery in 2017/18

The following table summarises the proposed cost of the service for 2017/18, compared to 2015/16 and 2016/17. It is based on engaging a representative from each of the unions:

Union	Actual 2015/16	Estimate 2016/17	Proposed 2017/18
NASUWT	£15,944		
NUT	£15,208		
ATL	£12,645		
NAHT	£3,332		
ASCL	£2,393		
Total Expenditure	£49,522	£48,770	£49,000
Income from other schools	-£6,456	-£2,010	-£5,000
Net Budget	£43,066	£46,760	£44,000
Support Service Recharges			4,900
NET COST	£43,066	£46,760	£48,900

The proposed budget for 2017/18 is based on the same method as 2016/17 and 2015/16 as follows:

- Reimbursement to schools providing release time for teacher trade union activities is based on 1fte supply teacher across all unions, paid on UPS 3;
- Each trade union to have five days for activities including attendance at local authority consultative meetings;
- Balance of budget available is divided proportionately by the number of current members in each union as at 1st June (the budget will be adjusted depending on the actual level of buy back from other schools).

Note that representatives work across all sectors, and it is irrelevant what type of school they are employed by. Therefore the total net cost is divided between all schools de-delegating rather than taking each sector separately.

Method of charging in 2017/18

The total cost of the service will be divided by the total number of pupils recorded in the October 2016 census to arrive at a per pupil amount for charging purposes. Using October 2015 census data to provide an indicative amount, this would equate to £3.07 per primary and secondary pupil. Appendix A of the main report shows the indicative total amount per school. Academy and other schools may choose to buy into the service at the same per pupil rate (this would provide funding for additional hours).

Other Options which *may* be considered

It should be noted that once a decision has been made to discontinue pooling arrangements, it would be almost impossible to reverse that decision at a later date. Therefore the HFG and SF need to be aware that a decision to cease pooling arrangements for this budget would be permanent.

Appendix D

Currently some academies are using their allocation for trade union facilities time to set up school based consultative arrangements, rather than 'buying in' to local authority arrangements. This might be the preferred model for all secondary schools in the future with de-delegation and funding of release time for representatives to undertake union duties in another WBC school to be confined to the Primary sector.

There may also be the option to consider a reduced service at a lower cost to schools.