Analysis of Local Authority Maintained Schools Non–teaching Responsibilities

For Somerset County Council

June 2022

Contents

Somerset's ask

Somerset's history and geography has resulted in a support system for schools that feels fragmented. Somerset is progressing thinking on how to improve this, aligning with emerging government timelines for all schools to join MATs by 2030.

TPX was commissioned to undertake a research project that identifies opportunities that improve the quality of support provided to schools.

The aim is that this work can be used to inform a future operating model for the Council's offer to schools (a "core offer" to maintained schools, and an offer to MATs).

Executive summary

Context

Somerset Council wants to rethink how it positions itself and how it can better support schools. The Council wanted to understand non-teaching pressures and costs, and to gain insights into the experiences and pain points of schools using Council services, and other third party services. This report provides insights and recommendations which will help inform a future operating model for a services provided by the Council.

Summary of findings

Maintained schools are broadly well disposed towards the Council, except where there are concerns about quality and value for money. Schools rarely differentiate between different parts of the Council, and clunky processes outside of Traded Services can affect perceptions.

A more defined core offer for all maintained schools could provide better clarity for schools on what they can expect, as well as ensuring schools have the right safety nets in place. It would also provide stability for priority Council services so they can focus on ensuring the quality of service provided. The research has highlighted areas where responsibilities may best be retained in schools, and opportunities where the Council can play a greater support role (see "what does for the core offer" here, here, here and here,).

For all schools – and small schools especially – there is very limited capacity for researching to inform decisions or chasing the Council. The Council could better support schools by providing stronger strategic-level advice (e.g. finances), clearer benchmarking and signposting (e.g. quality), and streamlining processes (e.g. recruitment, property etc).

There are also opportunities for defining an offer to Academies and MATs, helping define the role of the Council and transition to 2030.

What is in this report

The financial picture

Quality assurance and school improvement

Back-office functions (HR, Legal and Finance)

Recruitment and talent management

Site management, Maintenance and compliance

Partnership landscape

Implications for the core offer

Recommendations for addressing three prioritised themes

Recommended projects for defining the Council offer:
- A core offer to maintained schools
- An offer to academies

01 Our approach

What we did

Collaborative   Iterative   Transparent   User-lead

1. **Kick-off workshop** with the Council to build shared understanding of the strategic context, scope and ways of working

2. **Financial analysis of DfE data and council data** to understand financial context and identify lines of enquiry for qualitative analysis. Reflections on White Paper. Identify representative sample group of schools for 1-2-1 interviews

3. **Detailed interviews with schools and LA staff** and refining lines of enquiry after each session

4. **Regular synthesis and playback** of emerging themes with both LA Team and schools

5. Workshops to identify common **themes and prioritisation**

6. Workshops to build **'how might we' statements for each theme and ideas** for potential solutions

7. **Wider survey** to validate hypothesis

8. Final workshop to bring all the work together and **refine the final product**

9. **Final show and tell** to share in detail with schools and other stakeholders

Who we spoke to

| Analysis of financial data of 31 volunteer schools | 9 Council staff | 11 school business managers | 13 Headteachers | 50 attendees in two show and tells | 1 survey of 31 schools |

Including:

- Governance
- HR
- School Improvement
- Building surveyance
- Property & Grounds

Fairmead
Birchfield Community Primary
Dunster First School
Lydeard St Lawrence
Nether Stowey C.E. V.C Primary
Burnham Infants
Hindhayes Infant School
Curry Rivel Primary School
Evercreech Primary School
St Dubricius CofE School
Norton St Phillip First School
Lovington CofE Primary School
Wadham Community School

Lines of enquiry for interviews

Council staff

What do we know about schools' (non-teaching) priorities and experiences?

What services are provided (statutory and traded) by the Council for schools?

How are schools supported with selection and buying services (from the Council and third party suppliers)

What is the relationship with the Council as landlord, and how are Health & Safety, repairs and maintenance managed?

How are schools supported to understand how well they are doing for their pupils and families, and risk

Schools

What are the non-teaching responsibilities for schools, and how are these met?

What do leadership and business management spend their time on outside of learning, and what support do they need to reduce demand on their time?

What are the experiences of using the Council services and third party suppliers?

What do schools do for catering, cleaning, maintenance and H&S compliance?

How are premises managed and budgeted for, and what services (Council or otherwise) are used?

What are the drivers behind deciding to deliver in-house, go with the Council or with another provider?

What are the current and future pressures that might change the financial outlook

What partnership arrangements does the school take part in, what value does the school get, and how can this be improved?

How do schools budget, and mitigate/ insure for unintended costs? What are the biggest risks and financial pressures?

02 The financial picture

How to use this section

This section gives a summary of the overall financial picture from our analysis of [DfE](#) 2020/21 and Somerset financial data.

The insights were used to help us focus the qualitative research on areas of interest.

The data and tables can be looked at in more detail [here](#).

High-level Financial picture

Relative to other LA Maintained Schools across the country, Somerset Primary schools are in **relatively good** financial position – they are in the **top quartile of schools with surplus** across Primary, Special and PRU schools and the **bottom quartile of schools in deficit** for Primary.

Somerset LA maintained schools have the **highest expenditure in relation to other local authorities** across the country on: Administrative and clerical staff, Bought in professional services, Cost of other staff, Indirect employee expenses, Grounds maintenance and improvement, Information and Communication technology, Supply Teaching Staff and Vehicles, equipment and machinery.

Unsurprisingly, smaller schools spend more per pupil. Schools with fewer than 100 pupils (<100 NOR) spend £1,887 more per pupil than larger schools overall, including double on back office costs per pupil – **£371.91 vs £788.10** for schools with over 200 pupils**.**

There is a weak positive correlation between the size of school and total balances held. **The vast majority of schools are in surplus** and have under £250k balance held, with some outliers above that.
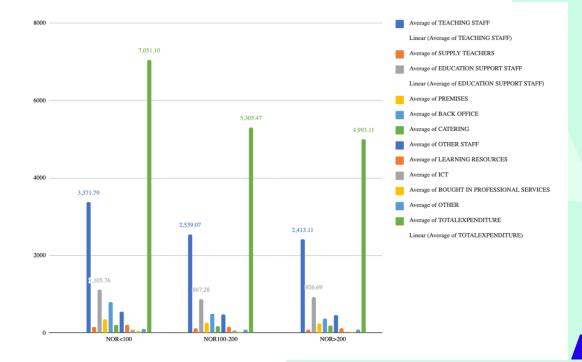
Size of school (NOR) and expenditure

This graph shows levels of spend, according to the size of the school (NOR = numbers of pupils on roll)

The overall trend is that the larger the school, the lower the costs per child on nearly all measures.

Theses economies of scale are most prominent once the schools exceed 100 pupils.

The most noticeable economies of scale come in the form of 'Teaching Staff Costs' and 'Back Office' cost.

Raw data available [here](#)

Legend:
- Average of TEACHING STAFF
- Linear (Average of TEACHING STAFF)
- Average of SUPPLY TEACHERS
- Average of EDUCATION SUPPORT STAFF
- Linear (Average of EDUCATION SUPPORT STAFF)
- Average of PREMISES
- Average of BACK OFFICE
- Average of CATERING
- Average of OTHER STAFF
- Average of LEARNING RESOURCES
- Average of ICT
- Average of BOUGHT IN PROFESSIONAL SERVICES
- Average of OTHER
- Average of TOTALEXPENDITURE
- Linear (Average of TOTALEXPENDITURE)

Chart values:
- NOR<100: 3,371.79 ; 1,105.76 ; 7,051.10
- NOR100-200: 2,539.07 ; 867.28 ; 5,305.47
- NOR>200: 2,413.11 ; 926.69 ; 4,993.11

Spend comparison to other areas

*The table indicates where Somerset spend is closest to 0 and therefore in the lowest percentile for spend across the country in **green** and where Somerset spend is closest to 1 and therefore in the highest percentile for spend across the country in **red**.*

Somerset LA maintained schools have on average higher expenditure compared to other areas in the country on:

- Administrative and clerical staff,
- Bought in professional services,
- Cost of other staff,
- Indirect employee expenses,
- Grounds maintenance and improvement,
- Information and Communication technology,
- Supply Teaching Staff
- Vehicles, equipment and machinery.

Expenditure item	All maintained schools	Primary	PRU	Secondary	Special
Acquisition of land and existing buildings (CE01)	0.000	0.000	0.000	0.000	0.000
Administrative and clerical staff (E05)	0.675	0.635	0.737	0.661	0.845
Administrative supplies (E22)	0.536	0.403	0.805	0.691	0.816
Agency supply teaching staff (E26)	0.165	0.086	0.650	0.428	0.580
Bought in professional services – curriculum (E27)	0.099	0.112	0.203	0.248	0.610
Bought in professional services, other, not PFI (E28A)	0.801	0.675	0.883	0.932	0.919
Bought in professional services, other, PFI (E28b)	0.596	0.000	0.000	0.000	0.904
Building maintenance and improvement (E12)	0.264	0.317	0.543	0.255	0.360
Catering staff (E06)	0.649	0.668	0.000	0.631	0.794
Catering supplies (E25)	0.556	0.496	0.407	0.691	0.808
Cleaning and caretaking (E14)	0.211	0.231	0.524	0.451	0.117
Community focused school costs (E32)	0.000	0.000	0.000	0.000	0.000
Community focused school staff (E31)	0.000	0.000	0.000	0.000	0.000
Cost of other staff (E07)	0.993	1.000	1.000	0.969	0.985
Development and training (E09)	0.589	0.364	0.873	0.879	0.698
Direct revenue financing (revenue contributions to capital) (E30)	0.364	0.337	0.834	0.676	0.757
Education support staff (E03)	0.284	0.271	0.776	0.721	0.345
Energy (E16)	0.490	0.390	0.825	0.721	0.345
Exam fees (E21)	0.668	0.000	0.582	0.969	0.610
Grounds maintenance and improvement (E13)	0.814	0.827	0.912	0.293	0.735
ICT learning resources (E20)	0.158	0.132	0.747	0.413	0.183
Indirect employee expenses (E08)	0.980	0.980	0.990	0.969	0.992
Information and communication technology (CE04)	0.814	0.874	0.815	0.375	0.617
Learning resources (not ICT equipment) (E19)	0.675	0.556	0.902	0.646	0.772
Loan interest (E29)	0.000	0.000	0.000	0.000	0.000
New construction, conversion and renovation (CE02)	0.192	0.092	0.776	0.556	0.779
Other insurance premiums (E23)	0.006	0.000	0.912	0.000	0.875
Other occupation costs (E18)	0.158	0.178	0.524	0.368	0.375
Premises staff (E04)	0.536	0.509	0.747	0.563	0.875
Rates (E17)	0.576	0.423	0.669	0.789	0.000
Special facilities (E24)	0.403	0.470	0.592	0.390	0.801
Staff related insurance (E11)	0.350	0.344	0.776	0.000	0.786
Supply teacher insurance (E10)	0.715	0.781	0.815	0.000	0.448
Supply teaching staff (E02)	0.887	0.920	0.611	0.578	0.808
Teaching Staff (E01)	0.443	0.450	0.747	0.120	0.683
Total bought in professional services (E28a/b)	0.596	0.543	0.864	0.684	0.889
Total expenditure	0.529	0.496	0.844	0.496	0.698
Total net expenditure	0.576	0.562	0.854	0.511	0.705
Vehicles, plant, equipment and machinery (CE03)	0.688	0.728	0.864	0.902	0.676
Water and sewerage (E15)	0.271	0.317	0.524	0.436	0.264

Revenue balance

This table shows levels of surplus and deficit compared to other local authority areas in England and Wales. Shades of green indicates Somerset is in the upper percentile with dark green being the highest (e.g. Somerset is in the upper percentile of schools with surplus) and red indicates that Somerset is in the lower percentile of schools, with dark red being the lowest.

Somerset LA maintained Primary schools are in the upper percentile of schools with surplus and the lower percentile of schools with deficit.

Conversely, Somerset LA maintained PRU, Secondary and Special schools are in the upper percentile of schools with deficit and the lower percentile of schools with surplus.
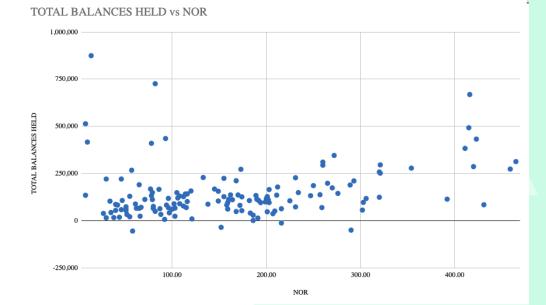
Revenue Reserve field	All LA maintained schools	Primary	PRU	Secondary	Special
Sum of number_schools_with_surplus	0.880	0.887	0.864	0.458	0.742
Sum of number_schools_with_deficit	0.622	0.483	0.728	0.781	0.661
Sum of PC_schools_with_surplus	0.721	0.715	0.291	0.203	0.294
Sum of PC_schools_with_deficit	0.324	0.298	0.747	0.796	0.705
Sum of total_revenue_balance_million	0.814	0.841	0.970	0.195	0.727
Sum of average_revenue_balance	0.331	0.317	0.883	0.195	0.507
Sum of revenue_balance_as_pc_total_income	0.814	0.854	0.873	0.195	0.713
Sum of total_revenue_reserve_schools_surplus_million	0.801	0.807	0.970	0.526	0.720
Sum of total_revenue_reserve_schools_deficit_million	0.264	0.609	0.242	0.165	0.242
Sum of schools_surplus_over_threshold	0.913	0.907	0.912	0.413	0.750
Sum of school_over_threshold_pc_surplus	0.867	0.860	0.572	0.443	0.558
Sum of school_surplus_over_threshold_million	0.841	0.860	0.970	0.481	0.750
Sum of school_over_threshold_av_per_school	0.099	0.112	0.932	0.413	0.514
Sum of total_income_million	0.668	0.708	0.932	0.518	0.580
Sum of B01_million	0.682	0.701	0.776	0.646	0.566
Sum of B02_million	0.841	0.874	0.980	0.165	0.816
Sum of B03_million	0.768	0.754	1.000	0.654	0.757
Sum of B05_million	0.860	0.536	0.000	0.954	0.014
Sum of B06_million	0.185	0.139	0.029	0.120	0.051
Sum of OB01_million	0.794	0.821	0.941	0.285	0.779
Sum of OB02_million	0.132	0.132	0.029	0.090	0.036
Sum of OB03_million	0.847	0.741	1.000	0.909	0.750

Revenue balances

This scatter graph shows total balance (£) held according to the size of the school (NOR = numbers on roll)

There is a weak positive correlation between the size of school and total balances held.

The majority of schools are in surplus and have under £250k balance held, with some outliers above that.

TOTAL BALANCES HELD vs NOR

03 Insights from the research

How to use this section

This section outlines findings under the [main themes](#) that have come from the research.

Against each theme, we have suggested what this might mean for adjusting a core service offer from the Council.

We have also suggested some key questions (How Might We) that the Council may want to further explore when defining its service offer.

Themes from research

Our interviews surfaced five main themes about schools' non-teaching responsibilities

Quality assurance and school improvement	The activity schools undertake to ensure they are meeting expected standards
Maintenance and compliance	The activity schools undertake to ensure they are providing a safe learning environment
Recruitment and talent management	The activity schools undertake to ensure they are attracting, developing and supporting staff with the right skills and expertise
Back-office functions (HR, Legal and Finance)	The activity schools undertake to ensure they are financially viable and compliant
Partnership landscape	The current and future role of local/national school networks and MATs

Insights:
Quality assurance and schools improvement

Insights: School interviews

School improvement was a key area schools felt could be better delivered through collaboration and improved partnership working. There was also an emphasis on the value of consistent and rigorous quality assurance checks for schools to ensure high standards are maintained across Somerset.

Currently, school improvement activity is largely individualised, ad hoc and heavily reliant on school's and Head teacher's personal relationships and network – there is a risk of losing the scale of the bigger picture in Somerset if school improvement is solely done on this basis.

Primary Head

" I am particularly keen to see how school improvement can be strengthened at the county level – drawing on shared resources and expertise "

There was a strong desire to leverage and share the collective knowledge and effort across Somerset with regards to curriculum, staff training and innovative pedagogical approaches.

Secondary Head

" School improvement is very primary focussed – this is a gap for secondary schools "

Given the small number of LA maintained Secondary schools in Somerset, it was noted that the school improvement offer was geared more towards Primary.

Primary Head

" As soon as school becomes Outstanding they are forgotten about… then they don't stay Outstanding for very long "

There was nervousness around the lack of support, assurance and checks for schools once they receive a 'Good' or 'Outstanding' judgment – it was felt there needs to be a consistent approach for this applied to all schools, regardless of Ofsted score.
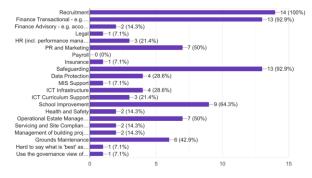
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Insights: School interviews

1. **A joined-up, ambitious vision and approach for Somerset** – There was a sense that sometimes in Somerset education leaders can struggle to move outside of their comfort zone and be ambitious about put learning outcomes for young people first.
2. **Sharing best practice and resources** – There was also a strong desire for a more coordinated, collaborative approach to sharing best practice and resources around curriculum development. Currently there is a lot of duplication and wasted effort going into lots of schools "recreating the wheel". This is particularly acute for smaller schools, who have smaller workforces and less capacity to continuously improve and upgrade curriculum maps and pedagogical approaches.
3. **Consistent quality assurance, no matter the position of the school** – There was a clear sense that approaches to school improvement felt fragmented and ad hoc. There is an understanding that the school improvement team in the Council is currently under a lot of pressure, and the focus of this team should be on holding leaders to account consistently, not just when schools are failing or need rescuing.
4. **MAT consideration** – The curriculum development and wider school improvement offer was a key factor schools interviewed were considering when thinking about joining a MAT. There was lack of clarity and confidence in school improvement activity happening within trusts.
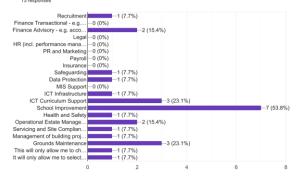
Insights: School survey

63% of respondents felt that school improvement was best undertaken at a school level, and only **36.4%** of respondents indicated they needed specific expertise and external support over and above what was available. **41.7%** of respondents felt School Improvement should be included as part of the Somerset core offer.

63.6% of respondents felt that school improvement could be better delivered through sharing resources across groups of local schools.

When asked what aspects of school improvement they needed more support with, respondents largely indicated **curriculum development, shared best practice (particularly in ICT) and Ofsted related training.**

What functions of school management do you feel are best undertaken at a school level?
14 responses

What functions do you feel could be better delivered through sharing resources across groups of local schools?
13 responses

22

What does this means for a core offer?

While it is clear that schools value their autonomy in school improvement efforts, there were expectations that t**he Council has a role in preventing schools falling into trouble, joining up opportunities for cross Council working on this, and ensuring there is adequate quality assurance in place** to ensure school leadership are making the best decisions in the interest of their pupils. Many schools rely on trusted advisors, external consultants and local partnership to deliver their quality assurance and curriculum development support, but the quality and price of these consultants can vary and is often based on existing relationships.

Guiding questions for the Council to consider in shaping the core offer:
1. How might we consider a wider package of tools that supports school leadership to understand how they are performing?
2. How might we ensure opportunities for improving the quality of education in Somerset are joined up and maximised?
3. How might we establish a Somerset-wide vision for education in Somerset that everyone understands their role in delivering, and a roadmap in place for achieving it?
4. How might we facilitate school leadership to make clear strategic and operational decisions in the most efficient way possible?

Insights:
Back office (HR, legal and finance)

X

Insights: School interviews

Business Managers and Finance Officers form a key part of the strategic planning resource in schools, but often don't have the capacity to focus on the more strategic and tactical aspects due to the demands of the every day, operational aspects of the role.

The Local Authority needs to be able to provide strategic, tactical and operational advice to schools and create capacity for Business Managers to deliver this work. In order to do this, it is key to identify which aspects of back–office functions are best held at a school level versus a Local Authority level (or a third party).
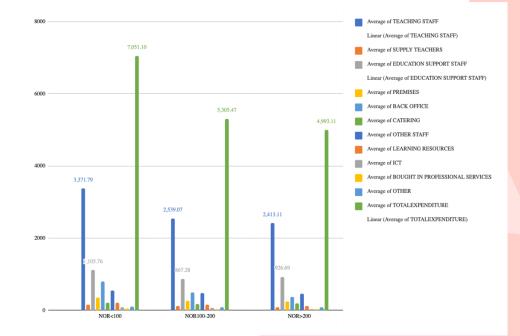
Primary Head

Our biggest bugbear is staff absence management – would be great if this could be done elsewhere

Primary Head

It's hard to try and identify and optimise access to funding from different pots – would be great to have someone from the LA help us with grant finding

Business Manager

We need stronger support around HR – we've had a huge influx of cases and referrals since the pandemic and we are looking at buying outside of the Council for this because the process hasn't been efficient enough

Insights: School interviews

1. **Schools are pleased with the quality of HR, Legal and Finance support** – Across the board schools praised the quality of the services they bought back from SSE and the flexibility of these services. There was a particular emphasis on the value of HR and Legal support, as these are areas that are usually outside the area of expertise of a Business Manager or Finance Officer. There was a desire for increased support with HR, particularly around staff absence management, operational health and back to work processes.

2. **Schools felt the Local Authority support services meant they don't need to engage in complex procurement processes – they looked to third party providers only when and where they felt they weren't getting value for money.** Schools referenced the cost efficiency and ease of buying back these services from the Local Authority as key factors in their decision to continue to buy back these services from the Council.

3. **More strategic/tactical advice is a gap in the offer from maintained schools at the moment.** There is a lack support for Head teacher's with strategic and tactical decision-making, particularly where there is high turnover or skills gaps in the governing body.
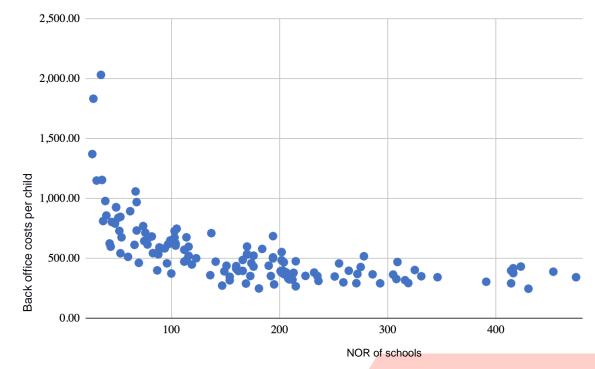
Insights: Financial analysis

Back-office is the third highest area of spend for schools regardless of school size, which is consistent with the national picture. Research suggests that on average, academies are spending more per pupil on back-office functions than LA Maintained Schools, and larger academy trusts are spending more per pupil than smaller trusts.

Relative to other LA Maintained schools across the country, Somerset schools spend in the upper percentile for Administrative and Clerical Staff (shown on slide 13) and Bought In Professional Services – other, which includes professional services/consultancy relating to: management, finance, legal, personnel and premises.

Insights: Financial analysis

Smaller schools spend almost double their larger counterparts of back-office and administrative functions.
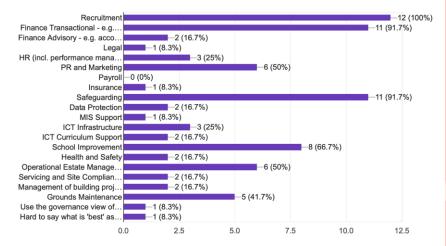
Insights: School survey

Recruitment and **Finance Transactional** (e.g. ordering, invoicing, monthly reconciliation) were the back-office functions that scored the highest as being best undertaken from a school level – selected by **90% or more** respondents.

PR & Marketing came next, selected by between **50%** of respondents.

The back-office functions that were selected the least frequently as being best managed at a school level were **Legal, HR, Finance Advisory, Insurance, Data Protection.**

No respondents felt payroll was best managed at a school level.

What functions of school management do you feel are best undertaken at a school level?
12 responses

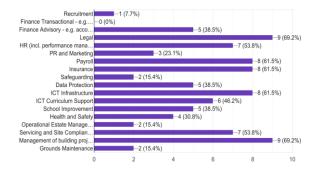| Function	Value
Recruitment	12 (100%)
Finance Transactional - e.g.…	11 (91.7%)
Finance Advisory - e.g. acco…	2 (16.7%)
Legal	1 (8.3%)
HR (incl. performance mana…	3 (25%)
PR and Marketing	6 (50%)
Payroll	0 (0%)
Insurance	1 (8.3%)
Safeguarding	11 (91.7%)
Data Protection	2 (16.7%)
MIS Support	1 (8.3%)
ICT Infrastructure	3 (25%)
ICT Curriculum Support	2 (16.7%)
School Improvement	8 (66.7%)
Health and Safety	2 (16.7%)
Operational Estate Manage…	6 (50%)
Servicing and Site Complian…	2 (16.7%)
Management of building proj…	2 (16.7%)
Grounds Maintenance	5 (41.7%)
Use the governance view of…	1 (8.3%)
Hard to say what is 'best' as…	1 (8.3%)

Insights: School survey

The back-office functions that the highest number of respondents indicated they required more support with over and above what is currently available were: **Legal, HR, Payroll, Insurance.**
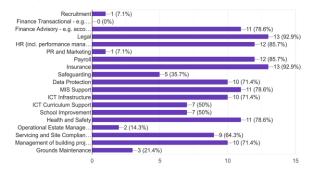
This is largely correlated with the back-office functions respondents felt would be best made available through a clear Somerset 'core offer': **Finance Advisory, Legal, HR, Payroll, Insurance and Data Protection.**

Functions that low/no respondents selected were: **Recruitment, Finance Transactional and PR and Marketing**.

Which of these areas do you feel require more specific expertise and external support over and above what is currently available/accessible?
13 responses

Which of these areas do you feel would be best made available to schools through a clear Somerset 'core offer' for all LA Maintained schools?
14 responses

30

What does this mean for the core offer?

There was strong consensus between the interviews, the survey and the financial analysis that there is buy-in for schools around the core offer for back-office functions. This is currently an area where spend in Somerset is high relative to other Local Authorities across the country, which is particularly acute for smaller schools. Schools trust and rely on the quality of the service that is provided currently and the majority of survey respondents indicated that **Legal, HR, Payroll, Finance Advisory, Insurance and Data Protection** would be best made available through a core offer to Somerset schools.

Guiding questions for the Council in developing the core offer:
1. How might we support a comprehensive understanding the impact of the White paper on individual schools (including future roles and responsibilities), and the role of the Council in facilitating schools to make the best decision within the interest of their pupils and community?
2. How might we ensure the package of services schools buy from the Council are what they are best placed to provide (e.g. can't be done better by an individual, MAT or the market)?
3. How might we facilitate school/ MAT leadership to make clear strategic and operational decisions in the most efficient way possible?
4. How might we support groups of schools/ MATs to commission in bulk where economies of scale provide better value for money – including developing the market where necessary?

Insights:
Recruitment and talent management

Insights: School interviews

Recruitment and talent management are time consuming and costly processes for schools. Feedback from interviews around where recruitment was best placed was mixed, with some schools citing they would favour centralised recruitment and some schools indicating they wanted to retain autonomy over their recruitment processes.

Across the board, schools we spoke to indicated that recruiting highly skilled staff with the right capabilities for roles could be challenging in Somerset, with schools sometimes having to run multiple recruitment rounds to hire one member of staff. Performance management, succession planning and CPD are also areas where schools need more support, in order to retain and develop high performing staff.

Primary Head

We spent £9k doing our own recruitment last year – too much time being spent on something that should be centralised

Primary Head

A Site Manager salary of £21k is not competitive enough around here for Site Managers, we have Hinkley Point down the road offering a much better rate

Business Manager

A better staff training and CPD offer is vital for us to improve retention

Insights: School interviews

1. **Schools expressed finding it difficult to attract and retain the right talent across the board, from governors, to site managers to SENCOs –** Schools indicated that banding for LA maintained schools is not progressive enough, e.g. a Site Manager salary of £21k versus real world expectations of a good site manager. This can make it difficult to hold onto really good quality learning support assistant because salaries are too low.
2. **Additional support with performance management, CPD and staff retention –** School's expressed a desire for a more consistent approach to performance management, development and retention, both for paid and voluntary staff across all levels (incl. governors).
3. **Challenges with advertising and marketing roles.** Some schools stated that they had to run several recruitment campaigns to hire for one role sometimes because response rates were so low.

Insights: Financial analysis

Somerset LA Schools scored in the top 10% percentile for **Indirect Staffing Costs,** which includes: **recruitment costs such as interviews, advertising and relocation expenses.**

This is in line with feedback from from qualitative interviews, where schools cited that a sharp increase in their indirect costs over the past few years was related to recruitment and staffing fluctuations and shortages throughout the pandemic.

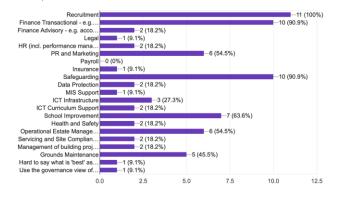| Expenditure item	All maintained schools	Primary	PRU	Secondary	Special
Acquisition of land and existing buildings (CE01)	0.000	0.000	0.000	0.000	0.000
Administrative and clerical staff (E05)	0.675	0.635	0.737	0.661	0.845
Administrative supplies (E22)	0.536	0.403	0.805	0.691	0.816
Agency supply teaching staff (E26)	0.165	0.086	0.650	0.428	0.580
Bought in professional services – curriculum (E27)	0.099	0.112	0.203	0.248	0.610
Bought in professional services, other, not PFI (E28A)	0.801	0.675	0.883	0.932	0.919
Bought in professional services, other, PFI (E28b)	0.596	0.000	0.000	0.000	0.904
Building maintenance and improvement (E12)	0.264	0.317	0.543	0.255	0.360
Catering staff (E06)	0.649	0.668	0.000	0.631	0.794
Catering supplies (E25)	0.556	0.496	0.407	0.691	0.808
Cleaning and caretaking (E14)	0.211	0.231	0.524	0.451	0.117
Community focused school costs (E32)	0.000	0.000	0.000	0.000	0.000
Community focused school staff (E31)	0.000	0.000	0.000	0.000	0.000
Cost of other staff (E07)	0.993	1.000	1.000	0.969	0.985
Development and training (E09)	0.589	0.364	0.873	0.879	0.698
Direct revenue financing (revenue contributions to capital) (E30)	0.364	0.337	0.834	0.676	0.757
Education support staff (E03)	0.284	0.271	0.776	0.721	0.345
Energy (E16)	0.490	0.390	0.825	0.721	0.345
Exam fees (E21)	0.668	0.000	0.582	0.969	0.610
Grounds maintenance and improvement (E13)	0.814	0.827	0.912	0.293	0.735
ICT learning resources (E20)	0.158	0.132	0.747	0.413	0.183
Indirect employee expenses (E08)	0.980	0.980	0.990	0.969	0.992
Information and communication technology (CE04)	0.814	0.874	0.815	0.375	0.617
Learning resources (not ICT equipment) (E19)	0.675	0.556	0.902	0.646	0.772
Loan interest (E29)	0.000	0.000	0.000	0.000	0.000
New construction, conversion and renovation (CE02)	0.192	0.092	0.776	0.556	0.779
Other insurance premiums (E23)	0.006	0.000	0.912	0.000	0.875
Other occupation costs (E18)	0.158	0.178	0.524	0.368	0.375
Premises staff (E04)	0.536	0.509	0.747	0.563	0.875
Rates (E17)	0.576	0.423	0.669	0.789	0.000
Special facilities (E24)	0.403	0.470	0.592	0.390	0.801
Staff related insurance (E11)	0.350	0.344	0.776	0.000	0.786
Supply teacher insurance (E10)	0.715	0.781	0.815	0.000	0.448
Supply teaching staff (E02)	0.887	0.920	0.611	0.578	0.808
Teaching Staff (E01)	0.443	0.450	0.747	0.120	0.683
Total bought in professional services (E28a/b)	0.596	0.543	0.864	0.684	0.889
Total expenditure	0.529	0.496	0.844	0.496	0.698
Total net expenditure	0.576	0.562	0.854	0.511	0.705
Vehicles, plant, equipment and machinery (CE03)	0.688	0.728	0.864	0.902	0.676
Water and sewerage (E15)	0.271	0.317	0.524	0.436	0.264

Insights: School survey

Feedback from the school survey indicates that **100%** of respondents felt that recruitment functions are best undertaken at a school level. **66.7%** of respondents indicated that when thinking about how to attract, develop and retain staff, the area they need more support in is **faster recruitment processes.** Only **9%** school indicated that they needed more support with recruitment and that they think it should be part of the core offer.
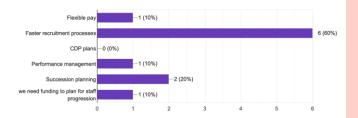
Only **18.2%** of respondents felt that HR (including performance management, grievances, disciplinaries and restructures) are best undertaken at a school level, and only **11%** felt they needed more support with performance management and succession planning. **90%** of respondents felt this would best be made available through a core offer from the Local Authority.

One school provided additional feedback:

"We need funding for staff progression and funding for CPD. We don't need help – we need money."

What functions of school management do you feel are best undertaken at a school level?
11 responses

Function	Value
Recruitment	11 (100%)
Finance Transactional - e.g.…	10 (90.9%)
Finance Advisory - e.g. acco…	2 (18.2%)
Legal	1 (9.1%)
HR (incl. performance mana…	2 (18.2%)
PR and Marketing	6 (54.5%)
Payroll	0 (0%)
Insurance	1 (9.1%)
Safeguarding	10 (90.9%)
Data Protection	2 (18.2%)
MIS Support	1 (9.1%)
ICT Infrastructure	3 (27.3%)
ICT Curriculum Support	2 (18.2%)
School Improvement	7 (63.6%)
Health and Safety	2 (18.2%)
Operational Estate Manage…	6 (54.5%)
Servicing and Site Complian…	2 (18.2%)
Management of building proj…	2 (18.2%)
Grounds Maintenance	5 (45.5%)
Hard to say what is 'best' as…	1 (9.1%)
Use the governance view of…	1 (9.1%)

Thinking about how you attract, develop and retain staff, which of these areas do you feel you need more support in?
10 responses

Area	Value
Flexible pay	1 (10%)
Faster recruitment processes	6 (60%)
CDP plans	0 (0%)
Performance management	1 (10%)
Succession planning	2 (20%)
we need funding to plan for staff progression	1 (10%)

What does this mean for the core offer?

It is clear that school autonomy on owning the candidate experience, interview and assessment process is key to ensuring the right hire for the school. However, there are several areas surfaced through the research that could benefit from a Council-wide service as part of the core offer, such as: advertising and marketing for roles across Somerset, setting salary bandings, consistent hiring processes to speed up recruitment timescales.

Schools also indicated through the survey that aspects of talent management such a performance management, grievances and restructures would be best addressed at a Council level. This was validated through interviews, where several Headteachers cited how time consuming these processes were and expressed a desire for a more consistent approach.

Guiding questions for the Council in developing the core offer:
1. How might we support a consistent and comprehensive approach to talent management and performance in Somerset schools – so that people are attracted to work in Somerset, are supported to develop, and are facilitated to perform to the best of their ability.
2. How might we ensure the marketing and attractiveness of roles is competitive at a hyper local and national level – including ensuring pay and conditions reflect the level of skills and experience needed
3. How might we ensure governors have the right skills and experience, and feel confident in performing their roles effectively

Insights:
Partnership working

X

Insights: School interviews

Schools value the various different partnerships they attend – but have found the emerging landscape difficult to navigate and are constantly reviewing the opportunity costs due to the demand on their time.

They particularly valued shared training, linking staff and support to curriculum leads.

They felt a more strategic view of the landscape of partnerships is needed – some valuing geography, and others wanting to join with schools they have more in common with.

The delay to the White Paper has caused confusion about the nature of schools relationship with the Council and the future decisions they need to make. Schools within the cohort interviewed are by definition well disposed towards the Council.

Primary Head

LA has always fundamentally been a good group of people that relied on and trust, and I value that

Primary Head

Training is the biggest area we would get value from working in partnership on.

Primary Head

Partnerships could become more diluted as schools join MATs, as MATs are protective. There have been instances of people dropping out due to joining a MAT

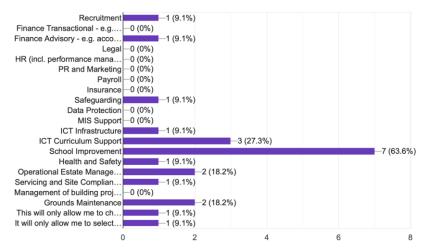# **Insights:** School interviews

1. Schools value partnerships and **attend a number of different formal and informal partnerships**. However they want to ensure they are a good use of time, and **find the shifting landscape difficult to navigate** – the emergence of MATs has made that even more complex.

2. **Training and staff mentoring is a strong area of focus for partnership** working, and there is potential for greater support of leads across schools (e.g. curriculum, business managers etc) who would otherwise be working in isolation.

3. Partnership working is particularly important for small schools, who value **learning on best practice and sharing of responsibilities**. They recognise that working in multiple ways isn't efficient.

4. Geographical partnership was important, but some schools wanted **a more strategic approach that joined up schools who were tackling the similar issues.**

5. There are some examples where **joint procurement might be beneficial** – for example buying tech.

Insights: School survey

63.6% of respondents indicated that school improvement could be better delivered through sharing resources across groups of local schools and **27.3%** of respondents felt that ICT Curriculum support could be better delivered through sharing resources.

Generally respondents did not seem to indicate that any of the other functions could be better delivered through sharing resources.

What functions do you feel could be better delivered through sharing resources across groups of local schools?

11 responses

Function	Value
Recruitment	1 (9.1%)
Finance Transactional - e.g....	0 (0%)
Finance Advisory - e.g. acco...	1 (9.1%)
Legal	0 (0%)
HR (incl. performance mana...	0 (0%)
PR and Marketing	0 (0%)
Payroll	0 (0%)
Insurance	0 (0%)
Safeguarding	1 (9.1%)
Data Protection	0 (0%)
MIS Support	0 (0%)
ICT Infrastructure	1 (9.1%)
ICT Curriculum Support	3 (27.3%)
School Improvement	7 (63.6%)
Health and Safety	1 (9.1%)
Operational Estate Manage...	2 (18.2%)
Servicing and Site Complian...	1 (9.1%)
Management of building proj...	0 (0%)
Grounds Maintenance	2 (18.2%)
This will only allow me to ch...	1 (9.1%)
It will only allow me to select...	1 (9.1%)

What does this mean for the core offer?

Partnership working has value for schools, and there is a lot of potential for greater collaboration through these – particularly on professional development.

The landscape of partnership working is constantly evolving, and cannot be tightly controlled, but there is a need for a strategic overview of what clusters make most sense and how areas of cooperation are facilitated – particularly as schools move towards MATs.

Guiding questions for the Council:
1. How might we ensure the Council is able to facilitate a county-wide view of partnership arrangements, training networks and communities of practice?
2. How might the Council create economies of scale through joint procurement in areas like tech and equipment?
3. How might the Council support a CPD and succession planning offer so that people can learn and develop across schools, and schools have a pool of talent to draw on?

Insights:
Site Management, Maintenance and Compliance

Insights: School interviews

School value the services they get on compliance as this is not their area of expertise, but were not adverse to going to a third party supplier if better value can be found.

Maintenance and repair activities are favoured at a school level (either in-house by existing staff or by small suppliers), but access to a list of approved suppliers was valued as this saved valuable time.

Primary Head

Responsibility for compliance sits with governors, who need a buffer and help with compliance aspects. It keeps us up at night as it's not our area of expertise. I would be interested to hear from LA how can support us

Primary Head

We realised we were not getting value for money for BEAMIS. We did a thorough cost benefit analysis and realised it was better doing in house.

As result of not being in BEAMIS we are able to do things like switch maintenance to someone more competitive and who's doing a better job.

Primary Head

Compliance is a big job across multiple schools. Having a "handyman" or contracts with small local providers can help with small, practical activities – but couldn't afford a large compliance programme.

Insights: School interviews

1. Schools (especially governors) need **mechanisms to ensure that the right checks and balances for compliance are in place** – it isn't an area of expertise**.** Large scale compliance programmes are too specialist/complex to run in-house (even across a number of sites). There is a mixed picture for how schools currently address this, with many schools satisfied with the service from the Council – but examples of third party suppliers providing value for money as well.

2. For **maintenance and small practical tasks, schools favour small local providers or in-house** (incorporated within broader roles such as caretakers). Schools value the Council's list of approved providers, but they question whether the costs currently provide good value for money. There is a weigh-up between the financial saving and time it takes to negotiate themselves.

3. The annual conditional survey is used as the basis for both the Council and schools to prioritise capital spend, but the pressure on capital budgets – and confusion over responsibilities for what the school or Council (as landlord) pays for – can create **disincentives to invest in preventative maintenance.**

4. Whilst big-ticket repair costs are covered by the Council as landlord, the **knock on impact of an unexpected repair can make a dent to school in-year budgets** when they do occur – meaning schools may not be able to deliver on other priorities.

5. The transformation and maintenance of **Tech is recognised as a priority for capital maintenance** to ensure they continue to be a school fit for the future (as demonstrated by the pandemic), as well as recognition that the failure of tech would have an immediate impact on their ability to function.

6. Schools have interactions with the Council outside of traded services, and **identifying who can help them feels disjointed and needs perseverance** (especially when unusual circumstances arise). Schools feel they can be passed from department to department without the issue being addressed, leading to a drain on their time, lost opportunities and knock on costs.
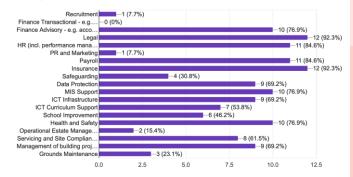
Insights: School survey

Management of building projects and Servicing and Site Compliance were both identified as areas where schools needed more support that could best be made available through a core offer to LA maintained schools, while Grounds Maintenance and Overall Estate Management were identified as areas best managed at a school level.

Which of these areas do you feel require more specific expertise and external support over and above what is currently available/accessible?
12 responses

Which of these areas do you feel would be best made available to schools through a clear Somerset 'core offer' for all LA Maintained schools?
13 responses

46

04 Recommendations for prioritised themes

How to use this section

Three themes were prioritised for developing recommendations.

These have been organised between actions that can be started now, and actions that need to be started later.   This was based on the potential level of impact, urgency and available resources.

Quality assurance and school improvement

Back-office functions

Recruitment and talent

Recommendations – to start now

1. Review and **clarify the core service the Council provides to all maintained schools and arrangements for funding** these (a minimum offer), so that the support that is most appropriately delivered at a Council level is in place for all maintained schools at the point they need it. This should be for the medium term, with a view to transition to post 2030 arrangements. The core service will need to incorporate the statutory services the Council provides, as well as the elements of traded services where they are recognised as vital and most appropriately delivered by the Council.

2. Together with the community and schools, develop and **agree a shared vision for educating children and young people in Somerset** that people can be proud of. This should include detail on how the strategic vision will be delivered (a theory of change)

3. Develop a **shared understanding of the landscape of how schools are doing in Somerset,** this can be done initially through the development of a data dashboard and its use to help guide discussions, identify themes / commonalities, signpost to resources/support and and provide a platform for schools to work collectively on shared issues.

4. Develop **a range of school improvement resources, good practice examples and tools that school leadership and governors can draw** on at any time to provide reassurance they are delivering for their children and young people, and how they can improve. This might include a wider team of school improvement partners

5. Develop a clear and **comprehensive understanding of compliance** – ensuring schools have access to tools and advice so they understand and have measures in place to comply with the regulations, standards and laws affecting all aspects of their operations

6. **Influence DfE priorities for the Trust Capacity Fund** (the fund to support trusts to take on new schools) to ensure it aligns with Somerset's priorities and emerging theory of change.

Recommendations – to start next

1. As part of work to empower schools to know and implement what good looks like:

   - develop **a peer review model** of schools to review and learn from one another

   - **identify schools that are already leading the way on particular challenges** so that other schools can learn from them

   - develop a two year cycle to ensure schools review performance and compliance against key areas (quality of education, safeguarding, premises etc)

   - **Develop communities of practice for school leaders and business managers** of to come together around common needs and share resources to address shared challenges.

2. Develop a cycle of continuous improvement for **Council services outside of the Traded Services umbrella** working with schools – to ensure they are addressing and meeting needs in the most effective way, and are ready for the transition to 2030.

3. Develop a **shared prospectus across all schools in Somerset that outlines the common approach to education in Somerset.** This can be used to build a shared identity, greater commonality, and ensure an education system people can be proud to be a part of in Somerset.

4. Building on learning from use of the data dashboard, develop a **clearer escalation and intervention structure** for schools at risk and in need of additional support.

Recommendations – to start next (cont.)

1. Create **greater standardisation across Somerset schools** as a way to reduce burden on leadership and ensure consistent quality and expectations. This can be done through (but not limited to):

   - Greater standardisation of governance and expectations on governors – for instance through developing key questions governors can ask of schools leaders to satisfy themselves on pupil experience and compliance.

   - Job descriptions of leadership roles, where people hold core responsibilities

1. Develop **training and personal development for people leading on curriculum subjects**

2. Develop **greater risk mitigation/ insurance across schools for highest risk situations** such as high staff absences and high cost maintenance – by reviewing approach to contingency, reserves and pooled budgets.

Recommendations – to start now

1. Develop a core service (5% top-slice), informed by

    – Refine with schools and service leads what the roles of the Council are vs schools

    – Refine where external support is needed/helpful, and where there are gaps in support

    – Develop a map of the market – who is providing / is able to provide for schools and what their offer is

    – Identify where there are gaps in provision where schools have fewer options

1. Use customer satisfaction data to raise the profile of traded services, and validate / address concerns

2. Set up fixed term partnership groups around areas that need a more joined up/ strategic approach (e.g. ICT, recruitment etc), and use the outcomes from this to inform longer term arrangements

3. Use models of good practice to inform where sharing of resources between schools vs local delivery is most appropriate

Recommendations – to start next

1. Develop a roadmap to delivery of the core offer – what will be done and when

2. Consider options for resourcing ongoing commissioning in bulk and consider it as part of the core offer – for instance is a core team of people needed for ongoing market development and contract management vs different schools leading on different contracts

3. Develop joint commissioning approach with Trusts and emerging Trusts (e.g. access to subjects expertise, insurance etc)

4. Review the need for a "super bursar" to lead groups of schools

5. Work with schools to identify what can be learnt from larger MATs elsewhere in the country

Recommendations – to start now

1. Develop a **quality and clear CPD offer to new teachers** with regular supervision and support. This will help ensure they feel supported to perform well, reduce employee attrition, and help build a common identify and approach to education in Somerset.

2. Review resources for and develop a **dedicated resource/team for recruitment** – to ensure swift and effective recruitment of school staff.

3. Develop a **clear offer of advice and training for people undertaking recruitment** in schools

4. **Promote Somerset as an attractive place to work**, through a shared marketing plan and activity – drawing on the Council's expertise and networks for this. Longer term, consider joining this up where there are similar roles across the Council. Identify good work that is happening in Somerset schools – so that people begin to recognise Somerset as a dynamic place to work and live

5. **Review terms and conditions** – including pay and allowances – to ensure Somerset is comparable to the market rate and schools are able to attract people of the caliber required.

6. Provide clearer links and clarity on the link with the Teaching Hub – what can be provided by the Teaching Hub/ Council and other providers

Recommendations – to start next

1. Review recruitment processes to

   a. make sure they enable effective and swift recruitment of quality candidates and reduce burden on candidates (e.g. requirement to supply references at application points, use of online capability tests etc)

   b. moderate roles and recruitment across schools and organisations – to ensure competitiveness ensure learning and commonality about what is working and a shared understanding of pay & conditions.

   c. Communicate, provide training and support so people are clear of their responsibilities

2. Identify, maximise and explore the creative use of external grants (such as the Apprenticeship Levy) that can be used to increase resources and staff in Somerset schools

3. Identify and share best practice of recruitment and CPD – to ensure greater standardisation of standards around recruitment.

4. Review and quality assure NVQs for teachers to ensure they are fit for purpose.

5. Rescope recruitment of governors to ensure they are clear on the demands of the role, and are not expected to undertake operational responsibilities.

6. Develop a pan-Somerset approach to mid/senior level moves and succession management – to ensure that talent is fostered and maintained within Somerset, and schools have a greater pool of people to draw on for succession planning.

7. Enable regular governance reviews to ensure governors feel empowered to hold school leadership to account

05 Next steps for the Council offer

How to use this section

This section suggests next steps for the Council to define what the new core offer will be.

It identifies the projects that will collectively help define what the core offer is.

To support this, it also suggests a starter for ten on:

- A framework for grouping Council education functions – to ensure a more joined up and complete picture for schools.

- A set of principles for defining what is within the offer.

Finally, it suggests a set of projects that are relevant to all schools in Somerset, and will help set the journey towards 2030 and all schools becoming MATs

Projects for defining a core offer to maintained schools

In order to determine the core offer, there are a set of priority projects we recommend undertaking. Four of them can be done concurrently.

Financial modelling for the core offer

Defining the service offer

Engagement with schools

Transition to MATs

Defining the final offer (including any transition)

Understanding functions by experience

I want to ensure my school is making the right decisions	I want to ensure my school is financially viable and meeting its statutory responsibilities	I want to ensure my school is performing well against expected standards	I want to ensure my staff have the right skills and expertise and are supported to develop	I want to ensure my school is a safe and effective learning environment for pupils	I want to ensure my school is leveraging its local network and drawing on best practice
SSE Governance	Education Finance Service	School Improvement	Employee Assistance Programme	SSE Property and Grounds	Spaeda Arts School
School resources for leaders	External Finance Services	West Somerset Research School	Occupational Health	Scientific Monitoring for schools	Bath & Mendip Partnership
	Exchequer Services	Moderation and Assessment EYFS	SAPH	Futures of Somerset	Wessex Teaching School
	Procurement		Career Progression Pathways	Refuse and Recycling	Meta Curriculum Project
	Somerset and South West Mutual Fund		E-Learning Service	Cleaning Consultancy	Somerset SACRE
	Insurance Services		Early Career Teaching	Ecology Services	Art Education Network
	Legal Services		Specialist and Personalised Training	Acoustic Services	Inspired Somerset
			HR Advisory	ICT	Connect PSHE
			School Recruitment	Data Protection	
			HR Admin and Payroll	MIS	
				Health & Safety	

It is recommended that the Council defines the core service according to school experience. This will ensure transformation is joined up and schools experience is complete. Here is an example of how existing functions might be organised. This is a starter for ten and needs refinement.

Principles for defining a core offer

To help define what is and what isn't included within a core offer, it is recommended the Council agrees a set of principles. A starting point for these principles could include:

Principle	Question
Responsibility	Do these services help the Council fulfil its statutory role on Education?
Risk	If the school were to decide not to do this, what is the level of risk if it wasn't done, or done badly?
Suppliers	Are there others in the market who deliver better value for money than the Council?
Expectations	Do schools and others expect the Council to deliver these services?
Affordability	If it isn't included in the core offer, would schools be able to afford it?
Performance	Is the Council service valued by schools and delivering value for money?

Project: Financial Modelling

Description: In defining what elements of Council services will be included in a core offer, a large factor will be affordability. A vital step is to identify what the total income will be if all maintained schools contribute a total of 5% to Council services. The Council will need to identify a total figure, as well as a figure that individual schools will be contributing so they can plan ahead.

This will need to be on a sliding scale as schools move towards MATs in the journey towards 2030, and the total available reduces.

It should also include a comparison with current income and spend, highlighting any immediate or future pressures on current budgets.

Target outcome: Understanding of the total finances available for a core offer to schools from April 2023 onwards, used to inform the future shape of individual functions and how teams will transition to a core service (and eventually all schools to MATs)..

Project: Defining the service offer

Description: Council services to schools (traded and other) will need to shape up a proposal for what activities might be provided within the core offer (using the principles as guidance). As part of this, they should consider if there are alternative ways to provide their functions.

It is recommended to do this iteratively in discussion with schools and staff. Grouping these functions according to school experience will help identify any interdependencies, and help provide a more seamless experience. A starting point could be for service managers to provide a short overview that details:

- Description of the function and how delivered
- Total current cost and staffing
- Take up and any performance measures
- Proposal for what should be included in the core offer – including costs and staffing, and risks and opportunities
- Minimum viable offer – including costs and staffing, risks and opportunities
- What activities could be offered outside of core offer, for schools to buy–back

Target outcome:

- Understanding of current costs and staffing and future pressures
- Costs of individual functions and options for the future shape (higher and lower cost)

Project: Engagement with schools

Description: Schools and services will need to know what the implications of a core offer are, in order to plan ahead. They will need detail on how their budgets are likely to change, as well as what services might fall in or out of the core service (so they can address any gaps or duplication).

Their input is vital in understanding any risks and opportunity, and getting the offer right.

It is recommended that this is done iteratively. A first step is to provide a high level proposal, for schools to comment on. This can be done concurrently to the other projects.

Target outcome:

- High-level proposal for what activities are provided by the Council as part of the core service offer
- Clarity on what responsibilities are retained within schools or groups of schools
- Proposal for any additional services the Council might provide that schools may opt to procure on a case by case basis

Project: Transition to MATs

Description: As we progress towards the Government's 2030 deadline for all schools to join a MAT, the number of schools buying into the Council's core offer will diminish, and some schools may decide not to buy into the core offer ahead of transitioning to a MAT. This could potentially impact the quality and viability of the services during the transition. To mitigate this, the Council will need to undertake work to define how it will work with schools who **a)** choose not to buy into the core offer and **b)** what an offer to MATs should include. The latter should be done in consultation with MATs and through analysis if service buyback from MATs currently.

Target outcome: A transition plan and research-backed service offer for MATs.

Project: Defining the final offer

Description: The final step on defining the core offer is to triage the school feedback, service proposals and finances to define the core offer.

It is proposed that a set of priorities can help define what is an essential part of the core offer.

The Council will also need to factor in:

- Any transition needed to new proposals, and how this will be addressed (including how budgeted)
- The Transition to MATs by 2030, and how services can plan ahead

Target outcome:

- A final core offer of what services will be provided to schools by the Council, and by when
- Service level budgets for the medium and longer term
- Guidance to schools on transition, and how to manage any gaps or duplication

Defining an offer for all schools

As well as the core offer, there are a number of projects the Council can lead on that are relevant to all schools in Somerset.

Partnership working

Recruitment discovery

Succession planning

Building control

Special Educational Needs (SEN)

Project: Partnership working

Description: Through our research with schools, many expressed they were keen for the Council to facilitate more effective partnership working, particularly around curriculum development, staff training and CPD and other school improvement activities. This project should map the current partnership landscape in Somerset and look at how to cluster schools to achieve common outcomes.

Target Outcome: A resource for schools that forms part of the core offer that enables them to see what types of partnership arrangements exist across Somerset and options for clusters for schools to join based on their objectives (e.g. curriculum development, CPD, school improvement etc)

Project: Recruitment Discovery

Description: Research highlighted that while certain aspects of recruitment are best managed autonomously at a school level (e.g. candidate experience, interviews, sifting) there are opportunities for elements of school recruitment to be managed centrally by the Council in order to streamline the overall process and make it more effective and efficient. A more indepth discovery of the end-to-end school recruitment process and resources should be undertaken, across a larger sample of schools, to identify what could be delivered better through a Somerset core offer.

Target Outcome: An evidence-based recruitment function that will be made available to schools as part of the core offer that will ensure a better, faster recruitment experience for schools and candidates.

Project: Succession planning

Description: Attracting, developing and keeping staff within Somerset was a key theme that came out of the research. An area–wide project that looks at how staff can be developed and supported in to opportunities across schools but within Somerset would provide the following benefits:

- Retain skills and experience within Somerset
- Ensure there is a greater pool of people to draw on when succession planning
- Ensure greater consistency and learning of best practice
- Reduce recruitment times and costs

Target Outcome: A succession and staff development strategy and function, which schools and governors can draw on to help develop and recruit staff

Project: Condition of buildings

Description: A conditions review of all school buildings is needed (prioritising the largest and most urgent) to help identify where preventative maintenance issues need to be put in place and how these are resourced. Due to nationally set financial processes, there is a disincentive to budget ahead for large maintenance items, with only the most urgent items addressed.

The Council, as landlord to schools, has a different relationship than traded services. As schools transition to MATs, the Council may retain its function and responsibilities as landlord, and new leases will need to be signed.

Target Outcome: Conditions review of all school buildings, and review of processes to ensure preventative activity is underway as well as urgent maintenance.

Project: Special Educational Needs (SEN)

Description: Special Educational needs was a strong theme from schools as wanting extra support – either because of a perceived increase in numbers, and/ or a delay in getting a child a statement so they shoulder the costs.

The Council has a number of activities underway to understand this further, including how the relationship with Academies affects numbers, and how to ensure the process for statements is as streamlined as possible.

Target Outcome: Reviewed and streamlined processes for SEN, and an understanding of overall trends in Somerset.

Appendix

Appendix

Artefacts and data

1. Final presentation (this document)

1. Financial analysis data and charts
   https://somersetcc.sharepoint.com/:x:/r/sites/LAMaintainedSchools-ProjectGroup/Shared%20Documents/TPXImpact%20-%20Discovery%20phase/Copy%20of%20Somerset%20-%20All%20Schools%20Maintained%202020-21%20-%20Additional%20Graph.xlsx?d=we75efe03aa394b3da5a91f1c55e81261&csf=1&web=1&e=wabZNd

2. Survey data
   https://somersetcc.sharepoint.com/:x:/r/sites/LAMaintainedSchools-ProjectGroup/Shared%20Documents/TPXImpact%20-%20Discovery%20phase/Somerset%20School%20Survey%20(Responses).xlsx?d=w787b73d467af46649a914083e4c6d504&csf=1&web=1&e=EOwGOC

3. Show and Tells
   a. Show and Tell May
      i. Deck
         https://somersetcc.sharepoint.com/:b:/r/sites/LAMaintainedSchools-ProjectGroup/Shared%20Documents/TPXImpact%20-%20Discovery%20phase/Show%20and%20Tell%201%20Somerset%20FA%20(client%20shared)%20(3).pdf?csf=1&web=1&e=QUJ422
      ii. Easyretro feedback
         https://easyretro.io/publicboard/hbDLef2HkLQha4sCpJnF6uwQYIl2/049ec33d-73db-4ccb-8cc8-d320dc97684e
   b. Show and Tell June
      i. Deck
         https://somersetcc.sharepoint.com/:b:/r/sites/LAMaintainedSchools-ProjectGroup/Shared%20Documents/TPXImpact%20-%20Discovery%20phase/Somerset%20show%20tell%20slide%20-%20final%20version-2%20AW.pptx.pdf?csf=1&web=1&e=t1xuHc

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2. DfE Financial Benchmarking data
   https://schools-financial-benchmarking.service.gov.uk/

3. Somerset internal analysis

4. Somerset EHCP data

5. SSE Website
   https://www.supportservicesforeducation.co.uk/

Thank you

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hello@tpximpact.com

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