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Introduction

Dear colleagues,

Many of you have been grappling with incredibly tight finances and are facing some very uncongenial choices as you recommend a budget to your local boards. We faced some similar decisions last autumn and when the siege was lifted by the Chancellor's extra £2M we said that we would take this year to consider the long term position. Unfortunately, not only has the underlying mismatch between our spend and our income maintained, in some ways it has got worse as inflationary pay increases need to be managed.

We have talked about the need to reimagine our provision for SEND so that the essential delivery of universal provision by classroom teachers becomes our default mode of support. In saying this or writing this we do not underestimate the massive change that this requires in our schools and from our staff. Our schools have already undertaken a self-audit of readiness for universal and have a plan of action. As we write our SDPs, can I ask that you ensure that this is a loud message to your school and that you have actions in place to make this transformation.

I am doing the same with the Trust Strategic Plan and when you read the introduction you will see that it is our main tune for the year. We are finalising our drafts this Wednesday and the document will be with you by the end of the week, I hope.

Where budgets are looking as if they may be unsustainable our Trustees will have to consider if some element of financial delegation might need to be suspended. This would be to introduce a recruitment freeze or allow the central team to become more involved in staffing decisions. Louise refers to this later in the bulletin. We would intervene reluctantly but necessarily, as all our finances interrelate and we have a duty to the prudent management of the whole Trust.

On a much brighter note, I hope that Heads saw the email from Janine on Friday asking you to hold the date for our Trust Celebration event late afternoon on 12th July. Can I also ask those of you who are interested to mark in Friday 14th July for our next Business Breakfast (the theme is apprenticeships!).

Given the gritty nature of school leadership, I hope that you all have a lovely and restful half-term planned. A proper break helps us do a great job during term time. I hope that the sun shines and that you get the rest that you deserve.

As ever,

Gary

Online training courses

The RPA have a suite of webinar recordings that SBMs and other colleagues may find interesting and helpful:

- Managing Property Loss Risk - [Watch the recording](#)
- Managing Security Risks - [Watch the recording](#)
- Managing Arson Risk - [Watch the recording](#)
- Risk Assessment and Accident Investigation - [Watch the recording](#)

School Develop Plan Proforma

Neil Lankester (our new Director of School Improvement) has been busy working behind the scenes with myself and Janine to develop a new (and hopefully improved!) school development plan. We shared it with the primary heads reference group earlier this week and have made some minor tweaks as a result. Thank you to those who gave their time to review this document. As with all things, we can tweak and adapt as we gain feedback from you all once you have run the process for next year.

Please click this [link](#) to view.

We will be sharing the document again, going through the process and how this links to the SEF in our next school leaders meeting, so please don't feel this piece of work needs to be done right now! However, I know that some of you like to get ahead and are wanting to get started, so feel free to click the link here and get going! We haven't had time to review the SEF as yet, so please use the current proforma for that process this year.

Best wishes
Debbie

RPA Cyber security requirements

Requirements have been in place for the past year in order to qualify for insurance through the RPA in the event of a cyber incident. This includes each school having a Cyber Security Response Plan, completing Police Cyber Alarm Registration complete and all staff and Governors completing the approved cyber security training.

If you are not yet compliant with these requirements please ensure that they are completed as a matter of urgency and inform Neill Bird (nbird@lsp.org.uk). We will be reporting non compliance to Trustees on 28th June.

School Risk Registers

As a reminder to schools, a copy of your most up-to-date risk register needs to be sent to enquiries@lsp.co.uk by June 9th please.

Display Energy certificates

This year's certificates have been completed and issued to schools, please get in touch if you are yet to receive yours.

Powerful Allies will be producing them again for us next year at the same price of £99 per certificate.

SBM away day 19th June

Please find attached the [agenda](#) for the Operational Away Day on 19th June. Invites have been sent to all School Business Managers. If you would like other colleagues e.g. an Office Manager to attend the whole day please email Diane (dlogan@lsp.org.uk). Please also contact Diane if you would like to invite other colleagues to attend a specific workshop(s). Please provide their name, role and contact details along with which workshop session they would like to attend.

School Business Managers will shortly be receiving an email to access the C-me Colour Profile. If you wish to take up the opportunity to receive a colour profile, and I would strongly encourage you to, please complete the questionnaire by no later than 12th June.

FINANCE UPDATES

Budgets for 2023-24 and beyond

Thank you for all the work that you are doing on your budgets for 2023-24 and the following two years. Many of you have been in contact to share the deficits that you are predicting and to share your concerns. We will work with you on an individual school or federation basis, but just wanted to share some key messages with you:

Overall messages:

- The budgets being projected are, mainly, in line with expectations. When we held our last 'Resourcing our Partnership' discussions last summer we were anticipating a reduction in our reserves during 2023-24 and this was a conscious decision to give us the time to properly plan and deliver the changes needed from September 2024,
- The deficits are, in the main, being caused by increasing costs, such as pay awards and energy, which are not adequately reflected in our funding allocations,
- The increasing demands for additional support for children and young people with SEND is also a significant and increasing factor in our projected deficits,
- We still face much uncertainty about our future costs, such as pay awards, and any subsequent changes to funding levels.
- Our Scheme of delegation is given on the basis that such budgets are achieved:
"This Scheme of Delegation is granted to schools by the Board of Trustees. The Trustees may withdraw this delegation or part of it if there is significant concern around the actual or predicated outcomes for pupils, the safety and welfare of pupils, the financial stability of the School or the probity of management or governance."

Now and for 2023-24:

- If you are projecting a deficit that is beyond your reserves in 2023-24 please contact us immediately,
- Take savings whenever opportunities present themselves,
- If you have staff turnover, don't appoint replacements, if possible,
- If you do have to appoint a replacement, please do so on a on fixed term basis if possible,
- Consider how support for children with SEND can be delivered within the classroom and from within existing staffing (or reduced staffing through staff turnover or the ending of fixed term contracts),
- Protect your reserves and don't plan to fund any projects that can be delayed. Protecting your reserves is important at a Trust wide level as well as at school level and Trustees are considering whether further restriction on the use of reserves is required in these very difficult circumstances,
- Consider if regular budgeted investment such as IT replacement programme or curriculum resources can be paused for a year,
- Ensure that strict arrangements are in place to control expenditure and prevent over-spends,
- We will support and, if necessary, challenge you in this process. Any challenge is likely to correlate to your capacity to take the actions listed above.

2024-25 and beyond:

We will review your projected budgets for 2024-25 and beyond in detail, and in partnership with you. This will be done in line with changes agreed following the Trustees review of reserves:

- We will start to work together in the Autumn to plan changes for September 2024. Changes will need to be developed by Christmas, agreed by Governors and Trustees in Jan/Feb with consultation launched in Feb/March 2024,
- The Learning Partners model is being trialled in 3 schools in 2023-24 and independently evaluated, with an interim report due in February 2024,

We are looking at potential changes to our operational structure to improve financial efficiency. We will consult all stakeholders on any proposed changes in the Autumn 2023.

Please do get in touch if you would like support or to discuss your financial projections. We are facing difficult times and will have to take some unwelcome decisions. However, we will work together and support each other. We have no choice but to live within the funding we have available, but we will keep children and young people at the heart of our decision making and treat everyone with the respect and fairness that they deserve.

Budget Monitoring

The deadline for the budget monitoring reports as at 30th April 2023 for central review is 2nd June 2023. Schools are able to carry out their budget monitoring using Orovia or IMP - it would be helpful to know if schools are going to use IMP in advance to help us plan our reviews.

Please drop the team an email via finance@lsp.org.uk when your monitor is complete and ready for review. Thank you.

HR UPDATES

Fixed Term Contracts - ending and renewal

Please can schools review staff members who are on fixed term contracts to identify if they are:

- a. being extended for a further fixed term period, or
- b. ending the contract in line with the contract of employment.

For staff who are being **extended**, please ensure that a meeting is held and followed up with a letter confirming the terms for the extension to contact. Please note that fixed term contracts should only be for up to 4 years, after which they should be classed as permanent contracts.

For those staff whose contracts are **ending**, please ensure that if the affected member of staff has continuous service for 2 or more years, either with your school or with other schools/ organisations that fall (under the Redundancy Payments (Continuity of Employment in Local Government, etc. (Modification) Order 1999, as they would be eligible for a redundancy payment.

In addition to this, for support staff only, please check if the affected member of staff is aged 55 years and over, as they may be eligible for a 'strain on the fund' payment, which can be significant to schools.

If you need further guidance on how to deal with fixed term contracts, please contact the central HR team: hr@lsp.org.uk.