

Katharine Lady Berkeley's School

AGM 28th April 2021



Presentation of Annual Report

Conclusions

Annual Report And Accounts

- The auditors had nothing to report by exception – the audit is therefore ‘unqualified’ (*ref page 21/22*)

Management Letter

- No unresolved audit issues from the 2018/19 audit.
 - Low risk items
- 1) Trustee Declaration of interest forms – should include all appointments
 - 2) Finance Policy – update policy for one off/exceptional purchases

Financial Review

- The overall revenue deficit in 2019/20 was **£10,266** (page 9)
- Cash and cash equivalents as at 31/8/20 was £857,244

Year end revenue and non-grant capital position

Page 25

Restricted funds (page 9)	310,378
Unrestricted funds (page 9)	184,001
Total excluding fixed assets	494,379
Less school fund (page 39)	- 48,336
Total revenue carried forward	446,043

Year end revenue and non-grant capital position

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<i>Restricted Funds</i>	
General Annual Grant	162,598
Other DfE/EFA Grants	9,847
Other Government Grants	73,366
Other Donations	16,231
Total revenue carried forward	446,043

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School Fund account	48,336
Fixed asset funds (note 18, page 41 CA-CL)	164,289
Overall balance (page 23 Net current assets)	658,668

Management Accounts 2019/20 and 2020/21

Staffing	Actual	2020/21
Staff teaching	4,851,408	5,000,000
Staff supply and cover	179,461	259,000
Staff learning support	347,173	387,000
Staff clerical/technical	758,344	830,000
Staff site and cleaning	313,554	330,000
Staff catering	153,693	145,000
	6,603,633	6,951,000

Other costs		
Utilities	80,433	82,500
Maintenance	83,581	85,000
ICT	23,224	35,000
Catering	112,064	130,000
Other	844,008	795,636
Covid	39,021	151,500
	1,182,331	1,279,636
Total expenditure	7,785,964	8,230,636

Management Accounts 2019/20 and 2020/21

Income	Actual	2020/21
EFA+SEN	-6,254,099	-6,588,789
Sixth Form	-853,642	-1,040,160
Teachers Pay and Pension Grants	-387,469	-386,000
Meals	-198,750	-152,852
Other	-76,612	-35,204
Total income	-7,770,572	-8,203,005
Total expenditure	7,785,964	8,230,636
Total income	-7,770,572	-8,203,005
Balance	15,392	27,631

Covid 19 – Financial Implications

School Lockdown - Main Areas Of Impact

- 1) Premises and Cleaning – getting school site Covid compliant and safe
- 2) Covid Catchup Learning – additional investment in teaching and learning for time missed during lockdowns
- 3) Lateral Flow Testing – during lockdown and mass testing on return
- 4) Canteen – unable to furlough staff & making the canteen cashless

Ongoing Covid Impact (The New Normal)

- Increased costs for school cleaning and cleaning supplies
- Increased need for agency and cover staff – clinically vulnerable, lockdown babies etc.
- Administration for lateral flow testing

Other Hidden Costs

- Costs associated with staff well being and increasing staff turnover
- General uncertainty – exams, trips, testing, further lockdowns?

Covid 19 – Financial Implications

Financials

1) Premises and Cleaning – £103k

2019/20 £50k – only £39k reimbursed by DfE

2020/21 £53k (so far) – no plans for the DfE to reimburse any ongoing costs

2) Covid Catchup Learning – £57k (so far) DfE have granted KLB £90k in three instalments for 2020/21

3) Covid Testing - £10k (so far) DfE have granted KLB £19k for mass testing

4) Agency and staffing cover – for 2020/21 expected to cost an additional £80k compared to last year

5) Canteen – due to lockdown and refurbishment down time the canteen will cost a projected additional £132k in 2020/21

Budget forecast

Student numbers

	Oct-19	Oct-20	Oct-21
Year 7	250	250	250
Year 8	258	252	250
Year 9	254	254	251
Year 10	250	254	250
Year 11	236	246	250
Year 12	131	137	130
Year 13	95	128	135
11-16	1248	1256	1251
Sixth form	226	265	265
	1474	1521	1516

Budget forecast

2020/21	
Teaching	5,000,000
Other staffing	1,951,000
Other expend	1,279,636
Total expenditure	8,230,636
Pre 16 income	6,245,668
Post 16 income	1,040,160
Other income	917,177
Total income	8,203,005
In year	-27,631
B forward	446,043
Balance	418,412

Budget forecast

	2020/21	2021/22
Teaching	5,000,000	5,232,325
Other staffing	1,951,000	1,989,500
Other expend	1,279,636	1,197,874
Total expenditure	8,230,636	8,419,699
Pre 16 income	6,245,668	6,801,240
Post 16 income	1,040,160	1,184,392
Other income	917,177	619,000
Total income	8,203,005	8,604,632
In year	-27,631	184,933
B forward	446,043	418,412
Balance	418,412	603,345

Budget forecast

	2020/21	2021/22	2022/23
Teaching	5,000,000	5,232,325	5,336,972
Other staffing	1,951,000	1,989,500	1,982,988
Other expend	1,279,636	1,197,874	1,210,625
Total expenditure	8,230,636	8,419,699	8,530,585
Pre 16 income	6,245,668	6,801,240	6,841,907
Post 16 income	1,040,160	1,184,392	1,184,392
Other income	917,177	619,000	619,000
Total income	8,203,005	8,604,632	8,645,299
In year	-27,631	184,933	114,714
B forward	446,043	418,412	603,345
Balance	418,412	603,345	718,059

The Future Financial Climate for KLB

Funding: National Funding Formula from 2021/22 (rather than managed by GCC)

Increase from £5,000 per student in 2020/21 to £5,415 in 2021/22. Distorted by historical teaching pay and pension grants wrapped up into formula.

Uncertain wage bill:

No pay rises agreed for either teaching or non teaching staff so much uncertainty.

Government plan to make minimum teaching salary £30k per year by 2022?, this will need significant wage increases across the scales.

School Rebuild: Savings will be made on day to day maintenance and potential refurbishments but additional funding may be required to get the most out of the build

Impact of Covid-19

- Number of cases
- New ways of learning / teaching
- Vulnerable children / children of key workers
- Levels of engagement
- Safety
- Mental Health & well-being – students & staff
- Rebalancing of priorities - Covid Recovery



Review of Objectives

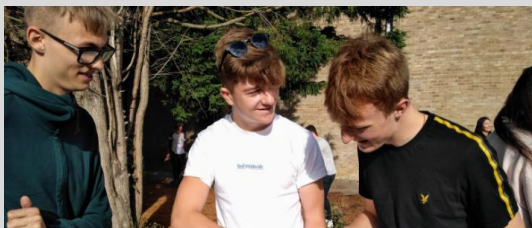
- GCSE / A level results
- Objectives from the School Development Plan for 19.20



GCSE grades

Key Measures

				
	Benchmark	2020	2019	2018
% Entries 9-7	30	31	30	25
% 9-5 EM	60	61	60	48
% 9-4 EM	80	82	82	72
% Ebacc (9-5)	30	36	35	31
Progress 8	0.3	0.33	0.15	0.02



A Level grades

Key Measures

	Benchmark	2020	2019
% A*	10%	20%	10%
% A*/A	30%	50%	32%
%A*/B	60%	74%	64%
ALPS QI	3	2	2
VA	0.2	0.52	0.41



Leadership
Performance Mgt
Marketing
Governance
Financial Mgt

Improve effectiveness of
Teaching & Learning

Develop the
Curriculum

Sixth Form
Standards
Curriculum

**School
Development
Plan**

Improve Provision &
Outcomes for
Disadvantaged Pupils

Well-Being
Staff
Students
School Site

Community
Parents
Local Community
Eco/Environment

Improve **Behaviour**
Alternative Provision
Positive Attitudes

Review of Objectives 2019.20

School Development Plan 20.21

KLB Development Plan 2020/21 & Beyond

School Development Plan 2020/2021 & Beyond

QUALITY OF EDUCATION

Curriculum (Intent)

Ref.	Objective	Action	SLT
C1	Covid:19 Recovery To respond to the needs of different groups of students in the wake of Coronavirus	- Remain up to date on, for example, government or exam board guidance/recommendations (on-going) - Work with HoDs in response to such recommendations and, if necessary, switch focus onto unexpected aspects of curriculum development (on-going) - KS3: Discuss with HoDs their concerns over lost learning time and impact on progress. Support HoDs in adjusting SOW in response. (Sept 2020)	CMA
C2	To review the Year 9 curriculum in the light of the recent developments in Years 7 & 8	- Explore the purpose of Year 9. How far should our Year 9 curriculum be an explicit preparation for Key Stage 4? - CMA to launch Year 9 review in term 2 at ACT - Communicate rationale for change and detail to school community and governors by end of term 4 - HoDs lead departments in the reviewing/revision of the Year 9 schemes. All schemes in place by July 2021 for teaching in Sept 2021	CMA
C3	To more effectively engage parents in understanding of the school's curriculum	Develop effective means of communicating the curriculum to parents by: - Production of whole school and subject-level "guidance notes" on curriculum intent, implementation and impact for each year group (by end of term 1) - Work with KMB and HoD to develop knowledge maps from the start of term 2 - Develop the curriculum part of the website – work with JDU and MJC on architecture / templates (July 2020) and then with HoDs on developing content (Term 1 onwards) - Link the T&L development of formative assessment and feedback into communication with parents about how well their child is doing (on-going)	CMA

KLB Development Plan 2020/21 & Beyond

COMMUNITY

Ref.	Objective	Action
Co1	Develop a programme of enrichment activities to strengthen sense of community.	- Pastoral team to produce a programme of enrichment activities for each year including a focus on team building activities - Links made between community contributions and school activities
Co2	Adapt events for parents to ensure continued delivery working within the parameters set due to Covid:19	- Produce range of scenarios for each event (e.g. online, hybrid, etc.) - Ensure parents continue to receive high quality physical events through use of video presentation
Co3	Continue to develop the sustainability agenda to improve eco-credentials and KLB impact on the environment	- Develop a sustainability plan for 20.21 (Sept 2020) - Involve students through the creation of eco-projects - Including one use plastics / food / waste etc. - Develop links with the local Climate Action Group
Co4	To further engage and work with the local community	- Assess situation regarding the September 2020 school closure - Continue to develop links with Business, six possibilities. To include working with Linda Wotton regeneration scheme - Work with local environment groups (see C3) - Continue work with local primary schools - Work with primary schools on further enrichment activities
Co5	To develop and implement a strategy to support Disadvantaged Pupils (DPPs) make better progress in their learning and enjoy success in a wider sense whilst at KLB.	- To develop DP plan and to ensure all staff understand the plan, amongst other things: - Quickly identify DPPs who have been disadvantaged - Term support package to help them - Departments to identify gaps in learning

KLB Development Plan 2020/21 & Beyond

PERSONAL DEVELOPMENT

Ref.	Objective	Action	SLT	Govs.
PD1	Covid:19 Recovery To respond to the wider effects of Covid:19 on young people's mental health.	- To consider the roles of the pastoral team in supporting students to return to school - Review assembly and tutor programme with an emphasis on resilience - To continue agency meetings with a focus on the most vulnerable families following Covid:19.	SLT	
PD2	To continue to develop the use of the pastoral audit to identify wellbeing needs within groups.	- Review 2019/20 pastoral audit, SEF and agency work - Set out a plan for 2020/21 - Tutors to conduct regular one to one mentoring with tutees	HSK/FBA	C&W
PD3	To develop opportunities for students to have an increased awareness and understanding of issues around diversity	- KS3: HSK to work with CMA on identifying opportunities for promoting through the curriculum - Review opportunities to promote diversity through PSHE programmes - Staff development – to include as part of twilight programme - Develop a sequence of assemblies to increase awareness and understanding of issues around diversity - Communicate KLB approach through information evenings / website content etc.	SLT	C&W
PD4	To review and update the RSE provision delivered through PSHEE, HC, tutor programme and assemblies.	- Audit current provision across the school KS3-5. - Incorporate DFE guidance and best practice. - Develop programme in light of KS3 curriculum review and changes	CMA/ HSK/FBA	C&W
PD5	To support students in developing ambitious plans for their futures and in helping them achieve their goals	- Continue to use Gatsby benchmarks to audit provision and develop a plan for the year ahead - Develop expertise in non-traditional career paths / futures in sixth form (e.g. graduate apprenticeships)	SPP	C&W

KLB Development Plan 2020/21 & Beyond

Teaching & Learning (Implementation)

Ref.	Objective	Action	SLT	Govs.
T1	Covid:19 Recovery To develop a recovery / catch-up programme	- Establish budget and resource programme appropriately by Sept / Oct 2020 - Year 13s students to have 10th period timetabled, either period 6 or elsewhere on the timetable - Identify students / groups of students who have fallen behind and who require intervention and support to recover - Develop summer holiday support to help students. Possibilities include: in-school provision for some subjects and especially some practical subjects where small group / practical work may be difficult in September and beyond - Recruit any necessary staff required to support the recovery programme	SLT	T&L
T2	T&L group members continue to build their confidence and understanding of recommended evidence-based teaching strategies as part of their professional development and contribute to the wider 'Department' and 'School Development Programmes'	- Complete the EEF programme before Xmas. - Evaluate the project	KMB	T&L
T3	To discuss and share best practice	Areas: 'Classroom Learning Intentions', 'Peer Review', 'Feedback' assessment' in line with the school's move towards trainee teachers		

KLB Development Plan 2020/21 & Beyond

BEHAVIOUR & ATTITUDES

Ref.	Objective	Action	SLT	Govs.
B1	Covid:19 Recovery	See B2 & B3 below	HSK	
B2	To ensure students' attendance returns to the previous level expected at KLB	- Additional support for D. Gardner to work with students and parents for whom the break from being in school (due to Covid) has precipitated a problem - Pastoral team to identify vulnerable children who may need additional support with attendance in Term 6 / contact with home. Encourage sense of belonging following the break and then mapped across the year for all	HSK/FBA	C&W
B3	To reflect changes to the classroom and expectations and promote positive behaviour	Review school site, especially in term 1 to engage students who have been in the school (end of term 1) and ensure, community) ready for launch in term 2	HSK/FBA	C&W
B4	To encourage visitors. Collaborate with the school in using restorative or similar approaches for behaviour in the school environment, initially through work in school via a working party and behaviour	Collaborate with the school in using restorative or similar approaches for behaviour in the school environment, initially through work in school via a working party and behaviour	JDU	C&W

Covid:19 Recovery

Teaching & Learning

Recovery
Development

Well-Being

Staff
Students

Sixth Form

Standards
Futures

School Development Plan 2020.21

Personal Development

Diversity

Develop the
Curriculum (Y7,8,9)

Attendance & Behaviour

Return to previous levels

Improve Provision &
Outcomes for
Disadvantaged Pupils

Ambition

Enjoyment

Success



DfE Re-build project

KLB



KATHARINE
LADY
BERKELEY'S
SCHOOL
FOUNDED 1384



