

Katharine Lady Berkeley's School

AGM 19 May 2025



Presentation of Annual Report

Conclusions

Auditors, Annual Report And Accounts

- KLB external auditors Randall & Payne are currently two years into a three-year contract, this has provided additional support and cost certainty with the Auditing process
- *Randall & Payne had nothing to report by exception – the audit is therefore ‘unqualified’(ref page 26-27)*

Management Letter

- No unresolved audit issues from the 2022/23 audit.

Presentation of Annual Report

Management Letter

Minor Items

Website remuneration disclosures are not up to date

Outdated declarations of interest register

Financial Review

- The overall deficit in 2023/24 was **£48,928** (page 8)
- Cash and cash equivalents as at 31/8/24 was £1,543,271 (page 32)

Year end revenue and non-grant capital position

Page 30

Restricted funds (page 8)	804,974
Unrestricted funds (page 8)	33,756
Total excluding fixed assets	838,730
Less school fund (page 51)	- 72,795
Total revenue carried forward	765,935

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Page 30

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Page 51-52

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<i>Restricted Funds</i>	
General Annual Grant	286,359
Catch-up Premium	22,282
Other DfE/EFA Grants	190,945
Other Government Grants	260,473
Other Donations	-27,880
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School Fund account	72,795
Fixed asset funds (note 21, page 56)	426,218
Overall balance (page 32 Net current assets)	1,264,948

Management Accounts 2023/24 and 2024/25

Staffing	Actual	Budget 2024/25
Staff teaching	6,154,455	6,630,122
Staff supply and cover	253,682	334,778
Staff learning support	549,209	535,203
Staff clerical/technical	1,022,658	1,059,224
Staff site and cleaning	361,699	379,954
Staff catering	178,450	186,400
	8,520,153	9,125,681

Other costs		
Utilities	216,082	182,000
Maint/Rebuild/Cap Ex	236,893	166,406
ICT	59,726	52,500
Catering	234,421	235,000
Other	910,768	965,216
	1,657,890	1,601,122
Total expenditure	10,178,043	10,726,803

Management Accounts 2023/24 and 2024/25

Income	Actual	Budget 2023/24
DFE & SEN	-7,619,380	-7,969,767
Sixth Form	-1,464,393	-1,413,144
Teachers Pay and Pension Grants	-509,246	-672,851
Meals	-330,653	-325,000
Other	-204,543	-100,500
Total income	-10,128,215	-10,481,262
Total expenditure	10,178,043	10,726,803
Total income	-10,128,215	-10,481,262
Balance	49,828	245,541

Budget forecast

Student numbers

	Oct-23	Oct-24	Oct-25	Oct-26	Oct-27
Year 7	262	251	265	265	265
Year 8	253	260	251	265	265
Year 9	259	253	260	251	265
Year 10	245	248	245	252	243
Year 11	240	239	248	245	252
Year 12	132	138	140	140	140
Year 13	134	124	138	140	140
11-16	1259	1251	1269	1278	1290
Sixth form	266	262	278	280	280
	1525	1513	1547	1558	1570

The Future Financial Climate for KLB

- Funding:** National Funding Formula to increase from £5,955 per pupil in 2024/25 to £6,465 in 2025/26 (but only a 0.5% real increase after supplementary grants rolled into the formula).
- Sixth form funding for 2025/26 has also only increased for KLB by 0.42% as additional grants now rolled into the main funding with no allowance for any future salary increases so far.
- Staff Costs:** Sep'25. Teachers to be offered a near 4% pay increase **UNFUNDED** by DfE. Academies assumed to have to use reserves or make savings. If approved this will have a very negative impact on many schools with no or little reserves.
- Non-teaching salary costs should have seen an increase in April'25, Government body has recently offered 3.2% increase (**UNFUNDED**) Unions currently balloting but the likelihood is offer will be initially rejected.
- In April'26 lowest pay point to be also increased to keep canteen and cleaning staff above minimum wage on top of any percentage increase.

The Future Financial Climate for KLB

Other Impacts;

1) Short term –

- Spring Budget 26th March, no additional school funding.
- Employers National Insurance – promised full funding but calculated by crude “per pupil” rates, leaving a approx. shortfall for KLB of £44k for a whole academic year.
- New Tax Year Apr’25 – National Living Wage rises to £12.21 per hour (6.7% increase this will be reflected in what we pay all cleaning and canteen staff and already difficult to recruit in these areas. KLB has recently entered into an external cleaning contract and we are reviewing the long-term structure of the canteen as wage rises aren’t sustainable

2) Longer Term –

- Still uncertainty over Academisation, many primary schools joining MAT’s
- No long-term plan from the Labour government for Education sector

The Future Financial Climate for KLB

How KLB are **still** addressing the funding gap;

- 1) Staff Recruitment and Retention – still continue where possible to adjust the curriculum/timetable and managing recruitment to make savings when staff leave or retire.
- 2) Savings - Potential savings from the New Building on maintenance, existing contracts, energy use & continue to limit department spending.
- 3) Investments – many funds and grants are received in advance, KLB now investing in short and longer term bank deposits with all interest earned reinvested back into the school.
- 4) Capital Funding – KLB have built up retained Capital Funding reserves of £304k to be allocated against rebuild costs outside scope of the project and remodeling of the existing main school corridor. Including investing heavily in the school IT infrastructure.
- 5) KLB Friends & KLB Foundation – ongoing donations are well received and give the school additional resources they would otherwise be unable to afford.

Review of Objectives

- School Improvement Plan 23/24
- GCSE / A level results 2024



KLB Priorities 2023/24

1. KLB Culture
2. Embedding adaptive teaching
3. Diversity and inclusion
4. Reading fluency/academic vocabulary
5. Wellbeing – staff and student
6. **Disadvantaged students**

Also:

- Outcomes in English
- Rebuild



KLB Culture 2023/24

Developing a whole-school **relational approach**

- Enrolled on GCC two-year Relational Schools Programme
- FBA/HSK to attend 6 days training and consultancy in Restorative Leadership
- Developing an ACE aware/trauma informed approach along with individualised and solution focused approaches to behaviour

Continue to **develop and embed classroom culture**

- Behaviour curriculum written defining key KLB habits and routines.
- Expectations and routines explicitly taught to students
- Department routines reviewed and updated
- Termly behaviour data shared with HODs
- Review of rewards
- Further develop the role of the BFL Manager

Curriculum & Adaptive Teaching 2023/24

- 1.To ensure that expectations are high and there is enough stretch and challenge for all pupils
- 2.To refine explanations and resources to support pupils' cognitive load.
- 3.To continue refining the use of effective feedback.

Diversity 2023/24

- Explore **CPD opportunities** for staff to strengthen understanding of diversity issues and how to support.
- Review the **school curriculum** to ensure it incorporates diverse perspectives, experiences, and contributions from various races and cultures.
- Integrate diverse literature, history, art, and cultural studies into the **curriculum**, promoting a more inclusive and representative learning experience for all students.
- Cross-curricular themes linked to diversity mapped across the curriculum
- Calendar of events

Reading

- Established tutor reading programme – Y12/13
Reading Leaders to lead 4 sessions every 4 weeks
Extracts provided with links to school values and activities will be led by 6th formers
- Develop oral or echo reading routines to boost fluency, modelling and scaffolding reciprocal reading skills, facilitating discussion to build oracy skills
- Reading for pleasure

Wellbeing 2023/24

- Review the current KLB offer to ensure we are providing a progressive **mental health curriculum** for all key stages empowering young people to take greater responsibility for their own mental health and developing their emotional literacy.
- Develop approaches to improving **the mental health of boys** - challenging traditional ideals of masculinity, and equipping them with the tools to be happy, healthy and emotionally articulate
- **Pilot mental wellbeing scale**
- Trial a new model for mental health/wellbeing intervention with more focus on **group work** rather than 1:1. Parents/carers of students involved to be invited to take part in parent workshop.
- Train year 12 volunteers to act as **peer ambassadors** to year 11 students. Supporting the students through exam stress.
- Lead a consultation with all stakeholders (parents, staff, students, trustees) to develop our **mental health and well-being policy**.
- CPD development for staff
- Work towards achieving the GHLL Mental Health Award.

Disadvantaged Pupils 2023/24

To implement a comprehensive strategy that provides effective support for disadvantaged pupils, leading to improved educational outcomes and enriched learning experiences.

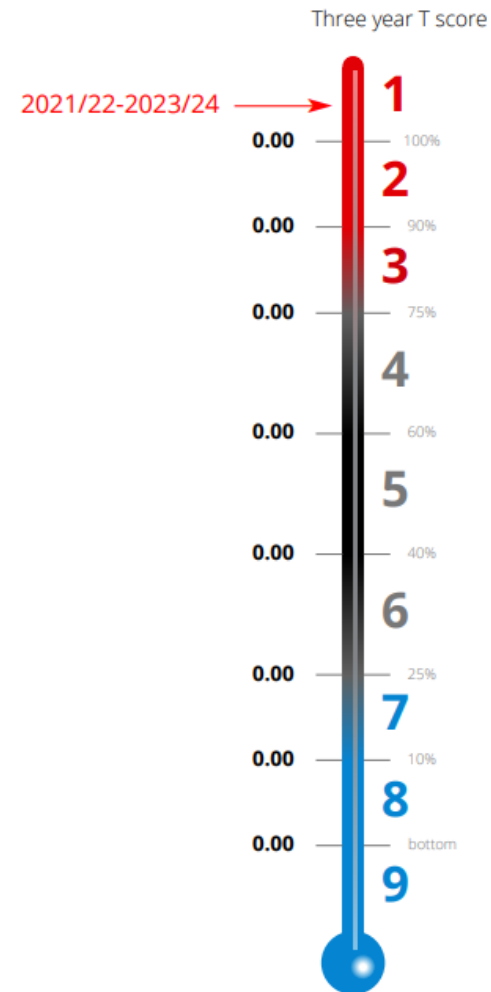
- Appoint a lead professional to champion DP students
- Liaison with relevant staff to provide intervention
- Monitoring and evaluation
- Celebrate achievements and share success

A Level Results

	2024	2023	2022	2021 (TAGs)	2020 (CAGs)	2019	2018	2017
%A*	15.4	13.9	19.7	20.0	19.5	10.3	14.1	11.9
%A* - A	37.6	34.2	49.4	49.6	49.6	31.9	36.9	35.1
%A* - B	66.4	63.4	75.1	78.4	73.7	64.7	67.0	66.8
%A* - E	99.0	99.5	100	99.7	99.0	99.4	99.5	100

A Level Results

- No gender split
- No group differences
- Destinations



GCSE Results

	2024	2023	2022	2021 TAGs	2020 CAGs	2019	2018
9-7%	34.1	31	37	36	31	30	25
9-5%	70.2	70	77	74	70	67	59
9-4%	85.1	83	89	90	86	82	75
9 %	7.3	7.7	12			7.9	6.5
9-8%	18.9	17	24			17	13
9-5 EM%	65	62	73	63	61	60	48
9-4 EM%	83	81	86	85	82	82	72

GCSE Results

	2023/24	2022/23	2021/22
Progress 8	0.39	0.37	0.38
P8 (HAP)	0.15	0.37	0.39
P8 (MAP)	0.53	0.40	0.41
P8 (LAP)	0.48	0.20	0.24
P8 (disadvantaged)	-0.25	- 0.65	-0.11
P8 (boys)	0.21	0.34	0.43
P8 (girls)	0.46	0.40	0.31
P8 (English)	-0.01	-0.11	0.02
P8 (maths)	0.52	0.51	0.44
P8 (Ebacc)	0.58	0.62	0.51
P8 (open)	0.33	0.35	0.43

Recognition and Progress Measures

- The Sunday Times Parent Power 2024 named KLB as the third best comprehensive school in the South West. This recognition is a testament to the exceptional effort and achievements of our students and staff.
- Newsletters
- In January, the Good Schools' Guide South West Editor spent a day in school. She met with HSK, groups of students, toured the school and spoke to a range of parents. The report was glowing.
- Progress 8 is 0.39
- For the first time in three years, 16-18 progress measures have been published. Our measure is fantastic and, when compared with Gloucestershire and other local counties' progress measures, really shows the impact of learning at KLB Sixth Form. Along with our competitive entry requirements, comparisons with independent schools, colleges, grammar and state schools, it is important for us to share this news with our school and wider community.

School or college name	Type of school or college	Number of students with an A level exam entry	Progress Score and Description	Average result		Students completing their main study programme	Achieving AAB or higher, including at least 2 facilitating subjects	Grade and points for a student's best 3 A levels
				Grade	Point score			
Cheltenham College	Independent school	148	ABOVE AVERAGE 0.34	B	40.99	NA	25.60% 117 students included in measure	B+ 42.39 117 students included in measure
Sir Thomas Rich's School	Academy	244	ABOVE AVERAGE 0.24	B+	44.3	97.20%	37.30% 244 students included in measure	B+ 44.1 244 students included in measure
Wyedean School and Sixth Form Centre	Academy	92	ABOVE AVERAGE 0.22	B-	36.37	96.60%	21.70% 60 students included in measure	B- 37.61 60 students included in measure
Katharine Lady Berkeley's School	Academy	130	ABOVE AVERAGE 0.22	B	40.08	100.00%	26.20% 130 students included in measure	B 39.51 130 students included in measure
The Cotswold Academy	Academy	137	ABOVE AVERAGE 0.19	B	40.29	99.00%	25.00% 100 students included in measure	B+ 42.47 100 students included in measure
Balcarras School	Academy	206	ABOVE AVERAGE 0.17	B-	37.4	98.10%	16.50% 188 students included in	B- 37.46 188 students

Governance Review

Update on 2024 Forward Look

- Completing an external review of Governance 
- Recruit new Trustees to fill identified skills gaps 
- Continuing to visit school and meet the staff 
- Continuing to create greater and more tangible links between the School and Trustees that will drive measurable outcomes 
- Continuing to support the rebuild programme 
- Succession planning, including recruitment of new Chair 

Governance Review

2025 Forward Look

- Helping the school to manage the challenging financial picture
- Recruit new Trustees to fill identified skills gaps, building greater links with the local business community and school staff
- Continuing to visit school and meet the staff
- Succession planning, including recruitment of new Chair
- Appointment of new external auditors

Governance Review

Trustee Composition and Experience

Name	Constituency	Experience	Roles
Hannah Khan	By Member invitation/ EX OFFICIO	Head Teacher, KLB School	Head Teacher
Andrew Covell	Foundation Appointed	Chartered Quantity Surveyor	Chair, Member of C&W and FSP Committees
Sarah Plant	Co-opted	R&D Engineer	Vice Chair, Chair of T&L, Member of FSP Committee
Simon Weston	Member Appointed	Chartered Architect	Safeguarding Trustee, Chair of C&W Committee
Ann McDonald	Foundation Appointed	Retired School Principal	Chair of FSP Committee, SEN Trustee,
Paul Downs	Parent	Chartered Civil Engineer	H&S Trustee, Member of T&L and FSP Committees
Nicola Johnstone	Parent	Finance Professional	Member of FSP Committee
Lucy Stacey	Associate	Office Administrator, KLB School	Member of C&W Committee

KLB2030



ASPIRATIONAL LEARNERS

Teaching and Learning - students enjoy learning in calm, purposeful classrooms where they excel but also feel safe to make mistakes. Teachers are subject specialists who engage learners with enthusiasm and expertise. All staff can demonstrate their commitment to professional learning. Teachers employ a wide range of strategies to help students learn conceptually and to transfer this learning with confidence into new contexts. Standards in the classroom are monitored systematically and there is a high level of expectation.

Futures - the progress and outcomes of all students provide the springboard for their next steps. Through a strong careers programme, students are made aware of the range of opportunities to which they have access, allowing them to make well-informed decisions about their future pathways and to be aspirational in their outlook. Students recognise the deeper purpose of the school's values and commit to the pastoral and enrichment programmes as an integral part of their personal learning in preparation for adulthood and the world of work.

Curriculum - the curriculum is underpinned by the KLB vision and values. It is broad, balanced and inclusive and is enriched by activities outside of the classroom which are accessible to all learners. The provision meets the needs of all learners at all stages and is mapped both vertically and horizontally to allow for the development of learning connections and deeper understanding. Learners leave school well prepared to take advantage of opportunities and challenges that lie ahead. There is a seven year pathway available to all learners.

Inclusion there is a commitment to equity and individuals are given support that is proportionate to their needs, enabling them to access the rich learning opportunities in the school. Students from less advantaged backgrounds enjoy the same levels of access as all others and there is no statistical evidence of a negative correlation between student outcomes and their background. Understanding global diversity and the strengths and beliefs of other cultures is a core part of the KLB curriculum.

Staff Survey

- CPD for teaching and support staff
- Appraisal processes for support staff
- Consistency re. dealing with behaviour and communication of response when passed on
- Sanctions – detentions, IE and SLT on call
- Innovation opportunities
- Workload
- Clear job descriptions

Parents' Survey

- What students learn
- Rewards
- Behaviour
- SEND
- Reports
- Assessment: volume, nature and feedback
- KS3 homework
- Mental health
- Mentoring and tutor contact

2024/25 Priority Projects

1. Professional development (T&L)
2. Relational approach (C&W)
3. Communication of learning and assessment (T&L)
4. Embedding KLB's values (C&W)
5. KLB's SEND offer (C&W)

Also:

- Disadvantaged students – equity role (FTB)
- Gender difference (FTB)
- Reading (T&L)
- Sixth Form experience (T&L)
- Finance (FSP)
- Rebuild (FSP)

KLB Rebuild

- DfE led and funded - based on condition and structure types
- KLB in first 50 schools
- Kier leading the programme



Timescales

- Relocated sports facilities – cricket nets, long jump etc **April 2023**
- New activity studio – ~~December 2023~~ **April 2024**
- New 3 storey block – ~~July 2024~~ **August 2024**
- Refurbished 6th form and main corridor – ~~December 2024~~ ~~Jan 2025~~ **April 2025**
- Refurbished Learning Support area – **May 2025 ??**
- Completion of demolitions and landscaping – **Summer 2025** **December 2025**

Notes:

- Living in the Berkeley Building
- Term 1 and 2 struggles!
- Site design