



Cyngor Bwrdeistref Sirol  
**MERTHYR TUDFUL**  
**MERTHYR TYDFIL**  
County Borough Council

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**SCHOOL BUDGET FORUM**  
**Working Group**  
**Tuesday, 19<sup>th</sup> November 2024**  
**(Civic Centre)**

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**NOTES**

**PRESENT:** Stuart James (Afon Taf)  
Owen Morgan (Cyfarthfa Park Primary)  
James Voros (Gellifaelog Primary)  
Simone Roden (Ynysowen Community Primary)  
Anthony Lewis (Head of School Planning, Support & Resources)

**IN ATTENDANCE:** Louise Ballinger (Education Accountant)  
Joanna Lewis (LMS Manager)  
Emma France (Clerk to the Forum)

No	Discussion/Action
1.	<b><u>Apologies</u></b> Apologies for absence were received from Sarah Hopkins and Rhiannon Stephens-Davies.
2.	<b><u>Actual / Average Salaries</u></b> JL presented members of the Working Group with a paper identifying 2 proposed models for the below for each school:  <u>SLT Model</u>  <u>Primary</u> <ul style="list-style-type: none"><li>• Group 1 fund maximum of 1 SLT</li><li>• Group 2 fund maximum of 1 SLT</li><li>• Group 3 up to 400 pupils fund maximum of 2 SLT</li><li>• Group 3 over 400 pupils fund maximum of 3 SLT</li></ul> <u>Secondary</u> Group 6 fund maximum of 4 SLT: <ul style="list-style-type: none"><li>• School average</li><li>• Sector average</li><li>• Variance per Teacher</li><li>• Variance per SLT</li><li>• Number of SLT in comparison to above model</li><li>• Revised funding model with SLT limits and School average (excl, HT &amp; TLR)</li><li>• Revised funding model based on all staff and school average (excl, HT &amp; TLR)</li><li>• Variances for each school moving from average sector to both models</li></ul>

No	Discussion/Action
	<p>JL: If a school has additional SLT above the agreed model member of staff funded at UPS3 only applies to three schools. UPS3 equivalent to L4.</p> <p><b>SJ: Both models exclude TLRs?</b>  JL: Yes, as agreed in previous Formula Funding Review TLRs are funded through the Pupil number.</p> <p><b>SR: SLT does not included Headteacher?</b>  JL: Yes, Headteachers are funded as a lump sum at the maximum of their IRS. If a governing body is paying additional percentage uplift, it is paid for by the school.</p> <p><b>SR: The schools where they have over the number of SLT, that member of staff will be funded at UPS3?</b>  JL: That is correct.</p> <p><b>SR: Changes to ALNCo not factored in?</b>  JL: No, we will need to reconsider, payment of ALNCo varies from school to school some are Deputy Heads, Assistant Heads, SEN points, TLR points, full time part time.</p> <p><b>AL: Do we have a timeline on the changes to ALNCo?</b>  SR: Not as yet.</p> <p>OM: The difference between the two models is marginal for most schools.</p> <p>AL: Model with SLT agreed level seems fairer.</p> <p><b>OM: If school choose to have a larger number on SLT then they can fund from school budget?</b>  JL: Yes, we would fund that person at UPS3, additional cost would come out of school budget.</p> <p>AL: With the SLT Group it would prevent schools from taking advantage of the funding model.</p> <p><i>AL left meeting</i></p> <p><b>SR: Funding will be based on actual salaries or school average salaries?</b>  JL: School average salaries, we cannot fund actuals as it needs to be calculated on PTR.</p> <p><b>SJ: Funding based on pupil numbers submitted?</b>  JL: Yes.</p> <p>SJ: I always put slightly less numbers in to avoid a negative retrospective adjustment.</p> <p><b>SJ: How would I know how many teachers I am funded for in comparison to how many teachers I employ?</b>  JL: It is on the sheet if you look at your funding, you are funded on 39.99 teachers and you have 45.90 teacher. CHS is the only secondary who has less teachers than they are funded for.</p>

No	Discussion/Action
	<p>JV: The fairest model is the average school sector with SLT limit.</p> <p>SR: Agree with JV, we currently have schools in a PLD or going into PLD that are being negatively impacted and that is not acceptable.</p> <p>Unanimous decision, agreed to recommend to School Forum the revised funding model with SLT and school average with no transition to start from April 2025.</p>
3.	<p><b><u>ALN – Enhanced support funding</u></b></p> <p>Proposal – set up ALN Task and Finish Group to consider different funding models and bring back to the working group for consideration.</p> <p><b>JL: How would you see the funding model working for enhanced support pupils?</b></p> <p>SR: Clearly it needs to be more transparent, we have this current bizarre system where funding is reliant on a colour code which we are not told what the criteria for each colour is. We are not told which pupils have been included in the calculation. The system is set up, so we are unable to challenge. Unacceptable</p> <p>JV: We also have a considerable delay to receiving the funding allocation. We did not have our final allocations until the last week of the summer term. By that point we had already given notice to strong, capable staff and they have secured other work.</p> <p><b>OM: What does GM want? If he wants a system based on an arbitrary number and delegate all funding based on that it will not work. This funding needs to be pupil need based.</b></p> <p>SR: That system will not work with the ALN code. In the code it is clear the LA retains responsibility. The current system has many positives. It is pupil led. The main issue is there is no clear criteria and the timing of the award. As JV said we need it earlier at budget setting time, which will allow us to retain our staff. The most important thing is it needs to be clear to everybody in the system what criteria is used to allocate money.</p> <p>JL: We would need to hold some money back for new IDPs and pupils moving into area.</p> <p>SR: Process to start looking at funding needs to start in January. We keep hearing that the budget is overspent. The budget is not overspent the budget is underfunded. We cannot tell a child you cannot have additional needs because there is no money in the budget to support you. If we move to an arbitrary delegation model the LA will have significant costs related to ALN tribunals. We need to improve the current pupil led model.</p> <p><b>JL: How?</b></p> <p>SR: Clear criteria for allocation that everybody knows and understands. Allocation of funding that is based on pupil need, not budget available. Level of funding known to schools during budget setting process.</p> <p><b>JL: Could we link funding to IDPs?</b></p> <p>OM: No, there are many children in the system who need this support and are not in receipt of IDP.</p>

No	Discussion/Action
	<p>SR: That would not work with ALN code. The LA need to remember that the LA retains responsibility. Delegation of funding does not dissolve the LA accountability.</p>
	<p>JV: ALP - there is no money in the schools to fund interventions.</p>
	<p>SR: I fail to see why there is secrecy around the current funding. Transparency is key. If funding handed over to schools, as a school if we are unable to meet the reasonable needs of the child, we can refer the IDP to the LA.</p>
	<p><b>OM: GM and the Task and Finish Group need to bring us various different models to consider. Can I ask why the LA wants to move from the current system?</b></p>
	<p>JL: It is very bureaucratic. The amount of time it takes LA officers to look at each school is not sustainable.</p>
	<p>SR: Firstly, it cannot be a cluster model that will not work at all.</p>
	<p>JV: The current system does not allow us to maintain staff. We spend time upskilling and training staff to lose them because we cannot give them contract from following academic year.</p>
	<p>OM: I don't see why it should take LA staff so long. The vast majority of these children will require funding for their school lives. Why are we wasting time at looking at these pupils every year. Their need is not going to go away over time. There should be a guarantee that these pupils will receive a level of funding for a three-year period or even their school life for some pupils. Reduces your bureaucracy and alleviates our issues that JV is referring to. Greenfield SS is full, LRBs are full, pupils who should be in one of these provisions are in mainstream – these pupils do not need to be considered each year.</p>
	<p>SR: There needs to be an actual needs analysis of pupils in the system and the budget needs to reflect that need with some additional for new pupils entering the system.</p>
	<p>SR: I agree with OM we need to have several models presented to us for the working group to consider.</p>
	<p><i>AL returned to meeting.</i></p>
	<p>AL: From discussions with SW/GM the suggestion is that GM set up an ALN Task and Finish Group of Headteachers / officers to consider models to come to either to this group or the full Budget Forum.</p>
	<p>SR: We agree the GM T&amp;F Group need to present the working party with several models for consideration.</p>
	<p><b>OM: When do they want this funding model to start?</b></p>
	<p>AL: Sep 2025.</p>
	<p>SR: Then we need the models presented to us in January for a robust consideration of the models.</p>

No	Discussion/Action
	<p>SR recapped the discussion to AL:</p> <ul style="list-style-type: none"> <li>• Clear criteria</li> <li>• Transparency</li> <li>• Pupil led not budget led</li> <li>• Timeliness of receiving funding</li> <li>• Amend current system to meet needs</li> <li>• Delegation via some arbitrary number will not work needs to be based on pupil need</li> </ul> <p>AL: Current system is too bureaucratic, current allocation and method of allocation is not sustainable. Funding does grow but in-year pressures are significant, model needs to build in some method of retaining some funding for new pupils entering system. Need to ensure system meets the needs of everybody. We could work out a factor and apply to all schools.</p> <p><b>SR: The most important thing is it works for the pupils we are supporting and that it is based on their need. When do the LA officers start working on this?</b></p> <p>AL: I understand it is around the end of February/March they look at each individual schools needs and it is very time consuming.</p> <p><b>SR: JL when do you receive the allocations for ALN Team?</b></p> <p>JL: Mid-May and I get the allocations out by end of May.</p> <p><b>SR: So just for me to be clear it takes ALN Officers around 6 weeks of work?</b></p> <p>AL: I'm not sure but around that time.</p> <p>OM: AL but they do not need to look at all the pupils in all the schools, most pupils' needs do not change. They do not need to be considered at all. It would only need to look at new pupils entering the system. Just by making the change that pupils are awarded support for a longer period than one year would considerably reduce bureaucracy, and it would give schools and families the security of knowing what additional support will be in place for their pupil in the longer term.</p> <p><b>SR: So, to be clear, you are setting up a T&amp;F Group to consider models and bringing that back to the Working Group to reduce 6 weeks of work for the ALN Team?</b></p> <p>AL: Not only six weeks of work with the appeal process. It is also about ensuring the budget is managed more effectively, currently it is in excess of £3 Million and this is challenging to manage with panel applications during the year. A smaller budget needs to be held centrally to manage the in-year demands.</p> <p>JV: There is also a lot of work for schools as well to provide the information and evidence required, a lot of paper work is requested.</p> <p>SR: If the criteria was clear and there was transparency in the funding model that would reduce the appeal and the workload.</p> <p>SR: Delegation through the FA will not meet the pupil needs and will not be acceptable.</p>

No	Discussion/Action
	<p>AL: Current system needs to be looked at as it is too bureaucratic. In RCT and other LAs it is funded through the FA.</p> <p>OM: And it is a complete disaster in RCT. Headteachers are very unhappy as it does not meet the needs of their pupils at all. Our model is far better than the one in RCT.</p> <p>AL: There are many different methods for funding we can look at, numbers on SEN/ALN Registers, current allocations, eFSM, WIMD data etc.</p> <p>SR: Not one of them would reflect the need of the pupils in our schools.</p> <p>AL: We can consider various models including hybrids and assess how well they approximate the needs of pupils and current allocations, and we need to ask other LAs what models they use. We would want a model that recognises need and grows in line with this or falls if need reduces in some individual schools.</p> <p>OM: Schools will be able to manipulate ALN data to maximise funding for pupils in need. We would see an increase in the number of pupils on the ALN Register.</p> <p>AL: There needs to be robust processes to validate the criteria being used. We could also look at a three-year average on PLASC data.</p> <p><b>SR: I thought the T&amp;F Group would be looking at models?</b></p> <p>AL: I am giving examples, it is something that JL has started to look at to inform discussions and will be considered in more detail by T&amp;F Group</p> <p>SR: I think OM has made a very valid point, officers do not need to spend time looking at pupils currently in system, their funding based on a fair and transparent criteria should be in place for a three-year period. The only pupils they need to consider are nursery pupils and new pupils in the system that would significantly reduce bureaucracy.</p> <p>Way forward ALN T&amp;F Group to provide several models to Schools Budget Forum/Working Group in Spring 2025 if implementation is to be from September 2025.</p>
4.	<p><b><u>PTR</u></b> AL / LB presented a report outlining potential options regarding the change to PTR within the FA.</p> <p>AL: No further information on budget settlement for the 2025/2026 financial year. Based on current information it is highly likely there will be a further reduction in school budgets. The FA currently shows 2 years of cuts 2023/2024 and 2024/2025 to the bottom line, rather than add a third year of cuts the proposal is to change the PTR to one of the options provided so that the 23/24 and 24/25 cuts are included within the FA factors. This will make it clear the impact of the 23/24 and 24/25 funding reductions on class sizes across the LA.</p> <p>Further consideration would be needed for any 25/26 funding cuts but the last two years figures would be included within the base allocation rather than coming off the bottom line.</p>

No	Discussion/Action
	<p>The options are outlined below:</p> <p><u>Primary:</u>  <u>Current Ratios</u>  30:1 PTR for Nursery  25: 1 PTR</p> <p><u>Option 1:</u>  30:1 PTR for Nursery  28: 1 PTR</p> <p><u>Option 2:</u>  30:1 PTR for Nursery  28.5: 1 PTR</p> <p><u>Option 3:</u>  30:1 PTR for Nursery  29: 1 PTR</p> <p><u>Secondary:</u>  <u>Current Ratios</u>  21.50: 1 PTR Years 7-9  17.50: 1 PTR Years 10-11</p> <p><u>Option 1:</u>  24: 1 PTR Years 7-9  20.5: 1 PTR Years 10-11</p> <p><u>Option 2:</u>  24: 1 PTR Years 7-9  21: 1 PTR Years 10-11</p> <p>SR: On a side note, can we please look at the admission numbers across schools. Due to the reduction in budgets many schools have reduced the number of teaching classes. As the school admission number does not reflect what we are being asked, to take pupils that will take us significantly over the recommended class sizes.</p> <p>AL: Helen Griffiths/James Michalski are currently completing an exercise to look at the capacity based on actual class numbers.</p> <p>AL: For this exercise we want the PTR to reflect the current funding levels so that it's clearer in the formula what the actual funding level of schools is.</p> <p>OM: This will have a huge impact on class numbers, for a primary school with 10 classes that will mean a reduction of 1 whole class.</p> <p><b>SJ: For Year 10/11 this would mean a significant reduction in the curriculum offer at GSCE</b></p>

No	Discussion/Action
	<p><b>with several subjects not being able to run. This does not meet the needs of our pupils in the area. Our children deserve the right to study MFL and music at GCSC as they do in other LAs.</b></p> <p>AL: This change will reflect what the cuts already mean for schools. It would be about allocating the 23/24 and 24/25 cuts to the formula factors so it's built into the base, rather than applying a new cut.</p> <p><b>OM: If we agree to this change, it will never be reversed. Will have a huge impact in education funding for many years.</b></p> <p>AL: The options have been presented for debate to consider best way forward and whether this is to include in Formula to show actual funding levels, or to leave against bottom line. Current cuts in 24/25 are at 7% in real terms, closer to 11% in cash-terms over the two years, if this was shown against the PTRs it would allow for clearer benchmarking against other LAs.</p> <p>SR: 7 % or 11% cut. It does not actually reflect the cut, as the cut is placed on the total delegated funding. If we remove the funding of SLAs – which we only agreed to get to the 85% delegation the impact on our true budget is far higher.</p> <p>JV: To be clear I am already in PLD and have a plan to get out of deficit within the MTFP. If I have any further cuts, I will not be able to reduce staff at all without impacting the curriculum delivery, H&amp;S and safeguarding of my staff and pupils. I will be in a deficit with no way to plan out of it.</p> <p>SR: I agree with JV schools are currently running on a very bare minimum. There will be no further cuts to be made in staffing and continue to meet our statutory obligations. All schools will be in deficit with no way to plan out of it.</p> <p>Following further discussions there was some consensus that making this change would be to accept the cuts that have been made to date and by changing the PTRs this would provide a funding level that would not be reversed in future.</p> <p>The Working Group agreed not to take forward proposals to amend the PTR in the formula funding.</p> <p>SR requested an exercise be carried out to look at the true % reduction in school budget when the SLA costs etc are removed.</p> <p>JL / AL will consider impact of budget cuts excluding SLAs and bring to working group next meeting.</p>