

SCHOOL BUDGET FORUM
Tuesday, 21st January 2025
(Ynysowen Primary School)

NOTES

PRESENT:

Stuart James (Afon Taf High)
 Jeff Beard (Cyfarthfa High)
 Owen Morgan (Cyfarthfa Park Primary)
 James Voros (Gellifaelog Primary)
 Rhiannon Stephen Davies (Greenfield Special)
 Anna Morris (Heolgerrig Community)
 Keith Maher (Pen-Y-Dre High)
 Simone Roden (Ynysowen Primary)
 Alwen Bowen (Ysgol Rhyd Y Grug)
 Craig Flynn (Director of Finance)
 Councillor Gareth Lewis (Cabinet Portfolio for Education)
 Anthony Lewis (Head of School Planning, Support & Resources)

IN ATTENDANCE:

Joanna Lewis (LMS Manager)
 Louise Ballinger (Education / Group Accountant)
 Stacey Green (Clerk to the Forum)

No	Discussion/Action
1.	<p><u>Apologies</u></p> <p>Apologies received from Sue Walker (Director of Education), Abby Sharpe (Abercanaid Community), Sarah Hopkins (Blessed Carlo Acutis), Mike O'Neill (Pen-Y-Dre High), Paul Phillips (Pen-Y-Dre High), Sarah Townsin (Ysgol Coed Y Dderwen), Garhard Williams (Union Representative) and Emma France (Clerk to the Forum), all accepted.</p> <p>Chair opened meeting and thanked all for their attendance and thanked SR for hosting.</p>
2.	<p><u>Minutes of meetings</u></p> <ul style="list-style-type: none"> • 10th December 2024 - Schools Budget Forum - Agreed (SJ & JB) • 08th January 2025 – Schools Budget Forum – Agreed (JB & RSD) • 13th January 2025 - Schools Budget Forum Working Group – Agreed (SR & SJ)
3.	<p><u>Matters arising from the minutes</u></p> <p>None</p>
4.	<p><u>Average v Actual Teacher Salaries</u></p> <p>Chair passed over to JL to lead on this.</p>

No	Discussion/Action
	<p>JL referred to the 3 attachments circulated:</p> <ol style="list-style-type: none"> 1. Through ADEW finance all other LA's were asked to respond with their current school funding models, only 9 LA's responded. As discussed in the SBF WG on 13.01.25, currently there is a mix of models used. 2. In the SBF meeting held on 10.01.25 it was requested that a comparison exercise be undertaken showing the variance in funding per school over 5 years based on sector average vs school average. In this table you can see that there are some significant winners and losers with the current model (sector average). 3. In the SBF on 13.01.25 a table was shared showing the impact of school average if applicable in financial year 2024/25, this has now been updated to include possible impact in 2025/26. First columns show total cost per school with the average cost per school. Separated from this is the SLT model as recommended by the working group. The four end columns show predicted funding for 2025/26 based on the two proposals (school average & school average with SLT separate). <p>Chair thanked JL for this breakdown.</p> <p>Chair summarised current position on this topic following this update and previous meeting. SBF & WG members have made clear recommendations, now down to members present to accept these proposals or not. Chair wanted to note that he has great faith in the members of the WG and respects the fair and professional work undertaken.</p> <p>Chair asked if any members had any comments before moving on to the vote.</p> <p>JL - apologised and explained that a point was missed in the earlier update. In the WG on 13.01.25 a tapered model was discussed. This would mean that schools negatively affected by school sector average funding would see a gradual approach to the reduction of funding over 3 years. This would mean in year 1 the maximum loss would be £36,000, year 2 would be increased to £72,000.</p> <p>JB – no objection to the taper model. With regards to this, schools negatively impacted on the sector average model, was there a taper model then?</p> <p>AL – sector average was an inherited funding system when Merthyr became a local authority. This may be why we see sector average across other LA's, all using an inherited system. Now seeing some variances on this i.e. spot points, adjustments to match available budget.</p> <p>SJ – Expressed concerns around us as an LA moving towards a funding scheme that is not used in most other LA's.</p> <p>AL – we're trying to look at a system that fairly funds schools, one other small LA are using a school average. We looked at all models used by other LA's and couldn't see a better or fairer scheme than we are suggesting.</p> <p>RSD – does this new funding proposal of school average cause more workload of the LA? Is this may be why other LA's are using sector average?</p>

No	Discussion/Action
	<p>SJ – and more cost to LA, especially with the taper model.</p> <p>AL – If we were to stick with sector average, we would look to simplifying this with spot points, this would benefit the LA. This would not be a fairer and more equitable model.</p> <p>Chair thanked all for their comments.</p> <p>Cllr GL – with regards to the LA’s that didn’t respond, particularly RCT and Blaenau Gwent, do we know what model they use?</p> <p>AL/LB – Sector average we believe think but not sure on this.</p> <p>Chair made his closing statement; he feels that the move to school average is not the way forward based on the fact that of the 9 LA’s who responded mostly use sector average. In terms of winners and losers, the figures speak for themselves. He would like to think that the staff employed above the sector average will have brought experience and had a positive impact on the pupils. He has concerns over the SLT model, this would leave one school with an ALNCO outside the leadership team which may be seen as unfair treatment and could be a recruitment issue. Chair summarised by saying that although there have been some difficult discussions he hopes that everyone feels that they have had a strong input and a chance to voice their opinions.</p> <p><u>Voting</u></p> <ol style="list-style-type: none"> In favour of move from sector average to school average: Yes – 8 No – 2 Abstain – 2 In favour of SLT model: Yes – 10 No – 0 Abstain – 2 In favour of taper model: Yes – 9 No – 0 Abstain – 3 <p>Chair thanked everyone for their input into what has been a lengthy subject – all proposals have been carried.</p>
5.	<p><u>Additional Support (progress update)</u></p> <p>Chair passed to AL to lead on this.</p>

No	Discussion/Action
	<p>AL – colleagues will be aware that we have started to look at ALN funding processes within the LA. As part of this we're looking at a move to delegating funding, meaning schools will receive this in their formula funding. This would mean having funding clarity earlier in the year for budgeting purposes. An ALN task and finish group has been set up by Gavin Metherringham, the first meeting was held at the start of January with headteacher representatives in the group. In this first meeting, potential delegated funding models were presented, a range of options were looked at, with the main aim being to minimise the flux in the system. The consensus in this meeting from headteachers was that if we move to a delegated funding model, we need to consider the current allocation as the main basis. Any new model needs to meet the needs of the pupils with no loss to schools. Further work needed in the LA, working with ALNCO's to reduce the current bureaucracy and simplify the current system. The next meeting is due to be held next week, with the follow up meeting with the task and finish group the first week in February. The aim is to present a proposal in this meeting, with the hope of rolling out for the new financial year in April. The aim is then to have proposals brought to this group via the working group in March.</p> <p>Chair asked for any comments:</p> <p>SR – Just to clarify, although the proposal is to delegate ALN funding to schools. The responsibility regards to ALN needs will still side with the LA. Current centrally retained funding for ALN is not enough to cover the needs of the pupils.</p> <p>AL – there has been a lot of pressure on the budget over recent years, if we move to delegated funding we will have to look at flexibility in the system to meet in year demands.</p> <p>SR – we have to meet the needs of the children. The cost of legal costs will be far more than the cost of support to pupils.</p> <p>AL – the new approach is not about looking for savings, it's more about meeting the needs of schools and being able to assess needs more efficiently. We have to aim for a less volatile system, more work is needed to find a solution to this.</p> <p>SR – what do you mean by a less volatile system?</p> <p>AL – a system where we recognise in advance where there are pressures and demands.</p> <p>AM – it was mentioned using demographics, e.g. eFSM – the worry here is that eFSM doesn't really give a true reflection of needs.</p> <p>SR – this model has been thrown out, the funding needs to be based on needs.</p> <p>AL – eFSM and WIMD are recognised as proxy indicators of ALN but when considered by the group it was felt that they didn't approximate closely enough the actual assessed needs in the system which is why they were rejected.</p> <p>Chair thanked all for the comments.</p>

No	Discussion/Action		
6.	<u>Date and Agenda for next meetings</u>		
	Schools Budget Forum		
	18 th March 2025	11.00am	BCA
	08 th July 2025	11.00am	TBC
	Schools Budget Forum Working Group		
	04 th March 2025	10.00am	TBC
	13 th May 2025	10.00am	TBC
	17 th June 2025	10.00am	TBC
7.	<u>Any other business as directed by the chairperson</u>		
	None		
	The Chair closed the meeting and thanked all for their attendance.		