
SCHOOLS BUDGET FORUM
Tuesday, 23rd September 2025
(Unit 5)

NOTES

PRESENT:

Keith Maher (Pen-Y-Dre High) - Chair
 Abby Sharpe (Abercanaid Community)
 Jeff Beard (Cyfarthfa High)
 Owen Morgan (Cyfarthfa Park Primary)
 James Voros (Gellifaelog Primary)
 Paul Phillips (Gellifaelog Primary)
 Rhiannon Stephens-Davies (Greenfield Special)
 Anna Morris (Heolgerrig Community)
 Mike O'Neill (Pen Y Dre High)
 Simone Roden (Ynysowen Community Primary)
 Sue Walker (Director of Education)
 Craig Flynn (Director of Finance)
 Anthony Lewis (Head of School Planning, Support & Resources)
 Councillor Gareth Lewis (Cabinet Portfolio for Education)
 Garhard Williams (Union Representative)

IN ATTENDANCE:

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

No	Discussion/Action
1.	<u>Apologies / Welcome</u> Apologies for absence were received and accepted from Sarah Townsin, Sarah Hopkins, Alwen Bowen, and Stuart James.
2.	<u>Election of Chairperson</u> Keith Maher was elected as Chairperson for the ensuing year.
3.	<u>Election of Vice-Chairperson</u> Simone Roden was elected as Vice-Chairperson for the ensuing year.
4.	<u>Terms of Reference for Schools Budget Forum</u> Accepted with no updates.
5.	<u>Update on Membership</u> <ul style="list-style-type: none"> No amendments

No	Discussion/Action
	<ul style="list-style-type: none"> One long term Governor vacancy - open vacancy to all governors.
6.	<p><u>Agree Terms of Reference for Schools Budget Forum Working Group</u> Accepted with no updates.</p>
7.	<p><u>Agree membership of the SBF Working Group for 2024-2025</u> Members agreed the following membership for 2024-2025:</p> <ul style="list-style-type: none"> Simone Roden (Chair) Stuart James (Vice) Sarah Hopkins Owen Morgan James Voros Rhiannon Stephens-Davies Alwen Bowen Anthony Lewis Louise Ballinger (Observer) Joanna Lewis (Observer) Emma France (Clerk)
8.	<p><u>Minutes of Meetings</u> The minutes of the meeting held on 8th July 2025 were agreed as a true record.</p>
9.	<p><u>Matters arising from the minutes</u></p> <p><u>(Item 6) School Funding Consultation</u> The LA provided a response based on the views of the School Forum and there was a joint ADEW response. Both responses to be circulated to the members of the forum.</p> <p>SR: Is the Pay Award going to be funded? CF: We have received funding from WG, we are currently carrying out a piece of work to see if it fully covers the PA. We funded 3% through the FA, but we ringfenced money for budget. I can confirm the full PA will be funded.</p> <p>SR: If the WG additional funding does not fully cover, is there money ringfenced to provide schools with the full PA? CF: Yes, I can assure you all schools will receive full PA funding.</p> <p>SR: Do we know when this will be received by teachers? CF: I understand it will be the October pay.</p> <p>AL: It is very welcome news for the forum and our schools, that the PA will be fully funded. Like to thank CF for his assurances.</p>
10.	<p><u>S52 2024/2025 Analysis</u> Information report shared and content noted. JL outlined headline information including:</p>

No	Discussion/Action
	<ul style="list-style-type: none"> The council's net education budget for 2025/2026 was 8.6% higher than the previous year and higher than the Welsh average increase of 7.3%. LA delegates 74% of monies to schools which is 6.1% lower than Welsh average and places the LA 20 out of 22 LAs. Delegated budget for each sector ranks the LA as: <ul style="list-style-type: none"> Primary 11/22 Middle 11/13 Secondary 21/22 Special 16/20 <p><u>Questions / Comments</u></p> <p>PP: The LA is the 3rd highest LA for centrally maintained budget. Can you explain why the LA has such a large centrally maintained budget in comparison to other LAs?</p> <p>AL: There are a variety of reasons including transport and the most is how we have previously funded Additional Support. That has been classed as centrally maintained. From April this has been delegated, so we will see a significant change next year %.</p> <p>PP: Transport, we are a compact county do we fund transport above the requirements?</p> <p>AL: No, we made the decision approximately 10 years ago to move to transport statutory levels. There are many differences in how the funding is treated which makes it very difficult to compare across LAs.</p> <p>AL: Many years ago, there was a WG target that all LAs needed to delegate 85% of funding to schools. We spent a significant period of time chasing that target. When that target was removed, we realised some of the elements we have delegated were paper exercises and did not benefit the schools or the pupils. As a forum we agreed we would only delegate if there was a benefit to the schools. The delegation needed to be meaningful and impactful. Much of this will be covered by school funded consultation that recently closed. It is hoped we will then have a clearer picture across Wales. We can provide you with further details of what budgets are held centrally and how that money is spent.</p> <p>Action: Further details to be provided of the centrally retained spend.</p> <p>SR: Does the centrally retained spend cover grants or core budget?</p> <p>AL: I think it includes grants but will need to check.</p> <p>SR: Will it include all funding and spending including the CFS team?</p> <p>SW: The CFS funding comes from a different grant.</p> <p>KM: I think it is important we see all funding and spending.</p> <p>SR: Agreed.</p>
11.	<p><u>SLA Evaluations</u></p> <p>Information report provided with summary and detail breakdown of SLA evaluations.</p>

No	Discussion/Action
	<p>Information and comments had been provided to managers of services providing SLAs and managers have been asked to contact colleagues to discuss concerns and how services can be improved.</p> <p><u>Observations / Comments</u></p> <p>AL: This is the results of our annual review. Next year will be the three-year fundamental review. We can see Property Services and School Meals are the lowest scoring services we offer. Information Governance was the service which had the biggest drop and the only service to receive a 1. Creditors and Breakfast Club services saw the biggest increase.</p> <p>AL: The forum agreed to recommend the Property Services SLA in March 25 but requested further updates in relation to the feedback from the 10% sampling, the invoice trail and online feedback for responsive repairs. Chris Jones will be invited to next forum to give an update. We will also consider next steps including the reflecting new technologies in the R&M document and review of funding schools receive for R&M, especially considering servicing requirements.</p> <p>JB: How long are we going to give the services who continue to score unsatisfactory scores before we tell them changes must take place.</p> <p>KM: I agree we need to look at the low scoring services but in the example of school meals, 2 is not unsatisfactory, there are strengths but also weaknesses that need to be considered.</p> <p>AL: With school meals, the schools who scored the service a 2 or below last year, many of those schools have now increased their score. There is also a pilot of a new menu in the primary schools, a consultation by WG has just closed with new regulation expected from April 2026. Some of the comments will be considered by the new menu and the new regulations. There have been some concerns about staffing numbers and capability, the service manager will be in touch with these schools to consider a way forward.</p>
12.	<p><u>Schools Balances 2023-2025 (Cabinet Report for information)</u></p> <p>Information report shared and content noted.</p> <p>Key messages outlined below:</p> <ul style="list-style-type: none"> Overall school balances at year end £861,000. This included year end grant from WG of in excess of £1,000,000. If the income had not been received from WG the overall school balances would have been in deficit across the LA. Current financial year projected school balances to have a deficit of £900,000. Five schools currently in deficit, LA officers and school leaders are working on recovery plans, but there are significant challenges. This is based on current funding levels not taking into account further cuts. There will be early indications of LA settlement in October, but the final settlement will not be

No	Discussion/Action
	<p>received until January 2026.</p> <p><u>Observations / Comments</u></p> <p>KM: As SR and I raised in the last meeting, the financial situation facing schools is alarming. We need to be clear that the current financial situation is impacting pupil attainment, the curriculum offered and the H&S and safeguarding of our pupils. We appreciate that this is across Wales and as a result of the funding mechanisms from Westminster and WG.</p> <p>AL: Across Wales 27% of schools are in a deficit position, currently in this LA it sits at 21%. Based on information shared with ADEW finance from LAs across Wales, this is projected to increase to 32% of all schools across Wales by 31st March 2026, with 13 LAs across Wales projecting to have their overall balance across all their schools in a negative balance. The national picture is very poor. This is being raised at ADEW.</p> <p>GL: It has also been discussed at the WLGA, all parties are fully aware of the financial situation facing schools.</p> <p>KM: This needs to be considered in the bigger picture, the World Health Organisation released a report outlining the impact of covid on a generation of pupils. We are seeing significant challenges facing our pupils, with mental health, attendance and behaviour concerns at a high. Schools are facing decisions to strip back all support to meet statutory obligations when our pupils have never needed the support more. We are at a tipping point and the impact on front line services is catastrophic. The long-term impact on the life chances of this generation of pupils cannot be underestimated and the strain this will put on public services will be immense.</p> <p>PP: I am a governor at a school in a deficit budget; we currently have a plan to bring the budget into surplus in 2027-2028 but this comes at an extremely deep cost to our pupils and staff. As governors we came into this to make a positive impact on children's lives. Schools are facing daily challenges to provide support to our most vulnerable learners. When we are unable to provide the support, we will see extra strain on other service areas, electivity home education, ALN, EOTAS. Schools cannot continue to maintain their current standards let alone continue to improve. Pupils are and will continue to be impacted. It is a crying shame that all the improvements that have been made to the schools across the LA will be reversed. There are big decisions to be made at a political level.</p> <p>KM: Thank you, PP, I fully agree and support the sentiments you raised.</p> <p>SW: We will call a special TEAMS meeting in January when the settlement has been received.</p> <p>KM: January is very late and will cause issues with potential HR process should Governing Bodies need to consider staffing levels.</p> <p>SW: Agreed.</p>

No	Discussion/Action																																			
13.	<p><u>Date and agenda for next meetings</u></p> <p>Schools Budget Forum:</p> <p><u>Schools Budget Forum</u></p> <table><tr><td>04th November 2025</td><td>11.00am</td><td>TBC</td></tr><tr><td>09th December 2025</td><td>11.00am</td><td>TBC</td></tr><tr><td>20th January 2026</td><td>11.00am</td><td>TBC</td></tr><tr><td>24th March 2026</td><td>11.00am</td><td>TBC</td></tr><tr><td>14th July 2026</td><td>11.00am</td><td>TBC</td></tr></table> <p><u>Schools Budget Forum Working Group</u></p> <table><tr><td>07th October 2025</td><td>10.30am</td><td>TBC</td></tr><tr><td>02nd December 2025</td><td>10.30am</td><td>TBC</td></tr><tr><td>14th January 2026</td><td>10.30am</td><td>TBC</td></tr><tr><td>10th March 2026</td><td>10.30am</td><td>TBC</td></tr><tr><td>05th May 2026</td><td>10.30am</td><td>TBC</td></tr><tr><td>16th June 2026</td><td>10.30am</td><td>TBC</td></tr></table>			04 th November 2025	11.00am	TBC	09 th December 2025	11.00am	TBC	20 th January 2026	11.00am	TBC	24 th March 2026	11.00am	TBC	14 th July 2026	11.00am	TBC	07 th October 2025	10.30am	TBC	02 nd December 2025	10.30am	TBC	14 th January 2026	10.30am	TBC	10 th March 2026	10.30am	TBC	05 th May 2026	10.30am	TBC	16 th June 2026	10.30am	TBC
04 th November 2025	11.00am	TBC																																		
09 th December 2025	11.00am	TBC																																		
20 th January 2026	11.00am	TBC																																		
24 th March 2026	11.00am	TBC																																		
14 th July 2026	11.00am	TBC																																		
07 th October 2025	10.30am	TBC																																		
02 nd December 2025	10.30am	TBC																																		
14 th January 2026	10.30am	TBC																																		
10 th March 2026	10.30am	TBC																																		
05 th May 2026	10.30am	TBC																																		
16 th June 2026	10.30am	TBC																																		
14.	<p><u>AOB</u></p> <p>None received.</p> <p>The Chair closed the meeting and thanked all for their attendance.</p>																																			