



Cyngor Bwrdeistref Sirol
MERTHYR TUDFUL
MERTHYR TYDFIL
County Borough Council

SCHOOL BUDGET FORUM
Working Group
Tuesday, 20th January 2026
(Unit 5, Pentrebach)

NOTES

PRESENT: Owen Morgan (Cyfarthfa Park Primary School)
Simone Roden (Ynysowen Community Primary School) – Chair
Stuart James (Afon Taf High School)
Sarah Hopkins (Blessed Carlo Acutis Catholic School)
Alwen Bowen (Ysgol Rhyd Y Grug)
Rhiannon Stephens-Davies (Greenfield Special School)
Anthony Lewis (Head of School Planning, Support & Resources)

IN ATTENDANCE: Joanna Lewis (LMS Manager)
Emma France (Lead Governor Services)
Louise Ballinger (Education Accountant)
Chris Jones (Building & Property Services Manager)

No	Discussion/Action
1.	<u>Apologies</u> Apologies for absence were received from James Voros (Gellifaelog Primary School).
2.	<u>Minutes</u> Minutes of the meeting held on 2 nd December 2025 were agreed as a true record. There were no matters arising.
3.	<u>Formula Funding Review 3-16</u> <u>Purpose</u> To consider a funding model to support a 3–16 school formula and review approaches used by other Local Authorities (LAs). <u>Background</u> <ul style="list-style-type: none">• Advice was gathered from other LAs via ADEW on how 3–16 schools are funded.• Responses indicate that most LAs fund 3–16 schools as separate Primary and Secondary schools, including funding for both Headteachers. <u>Proposed 3–16 Allowance</u> The LA proposes introducing a 3–16 allowance to: <ul style="list-style-type: none">• Reflect the Primary Headteacher lump sum allocation.• Recognise additional responsibilities for teachers working across the full 3–16 age range.

No	Discussion/Action
	<p>Allowances included:</p> <p><u>Head of School Allocation</u></p> <ul style="list-style-type: none"> • Funding equivalent to an additional Primary Headteacher (Group 3). • Ensures funding for two Headteacher equivalents: <ul style="list-style-type: none"> ○ Executive Head (via HT lump sum) ○ Head of School (via Primary HT lump sum) <p><u>Non-Teaching Teacher Allocation</u></p> <ul style="list-style-type: none"> • Funding for an additional leadership-scale non-teaching teacher. • Replaces the former federation allowance arrangement. • Recognises whole-school operational needs and increased leadership non-contact time (e.g., Heads of Family with 40% non-contact). <p><u>Teacher Workload Funding</u></p> <ul style="list-style-type: none"> • Additional funding to support increased whole-school responsibilities across subject areas. • Value: £10,372 (5% uplift) • Acknowledges that some teachers (e.g., whole-school subject leads) require extra non-contact time. <p><u>Funding Model</u></p> <ul style="list-style-type: none"> • All other indicators will remain consistent with: <ul style="list-style-type: none"> ○ Previous 2020 Formula Funding Review ○ Average School Teacher Salary model (from April 2025) • Funding will continue to differentiate between Primary and Secondary elements where applicable. <p><u>Implementation Timeline</u></p> <ul style="list-style-type: none"> • The 3–16 formula will apply from 1 September 2026, when the school moves to a single site. • Funding transitions from 1 April 2026, with an aggregated formula. <p><u>Funding Periods</u></p> <ul style="list-style-type: none"> • 1 April 2026-31 August 2026: Current formula across four sites. • 1 September 2026-31 March 2027: New 3–16 single-site formula. <p><i>AB joined meeting.</i></p> <p><u>Discussion / Comments</u></p> <p>AL: This will reduce the savings for the LA to £265,000 per annum from circa £350,000 if the additional factors in the 3-16 allowance weren't included. This 3-16 allowance will allow for the 3-16 school to function as a whole school and not a primary and secondary phase where staff will have whole school responsibility.</p> <p>SH: This further loss in funding for the school will be difficult for the school to manage, will mean further non-teaching and teaching reductions, but with the allowance, this proposed funding mechanism is fair.</p>

No	Discussion/Action
	<p>SR: How will the SLT model in the average teacher model be applied? JL: Separate primary and secondary model. The secondary will be a Group 6 school, 4 SLT will be funded, the primary will be a Group 3, 2 SLT will be funded.</p> <p>SR: Will there be a transition? JL: No fully implemented for September 2026.</p> <p>SH: There are concerns about some roles for example the Futures Lead for LLC covers whole school, English, Welsh and French, which has considerable accountability. With 30% non-contact time. These areas will be under review.</p> <p>Members agreed to vote:</p> <p>Recommend that Formular Funding review 3-16 be accepted and considered by full School Forum.</p> <p>Unanimously agreed.</p>
4.	<p><u>Property Services SLA (CJ)</u> CJ provided the below information regarding the actions.</p> <ul style="list-style-type: none"> • Inspections - work ongoing, new contract starts 2nd February. Main contractor Cardo (Cardiff based) second SNR (Merthyr based). • Invoices - trial was successful, aim to roll out to all school from 2nd February, subject to capacity, timescales may be little longer. This gives school an opportunity to check work and query invoices prior to payment. If no query or invoice not paid within 5 days invoice paid centrally. • Survey - from 2nd February there will be a link to a MS form which will contain a survey on each invoice email, allowing Headteachers to provide feedback. • Schedule of rates - LA just received updated schedule of rates. CJ to enquire if Headteachers are able to have a link to access. • RAMIS - Headteachers expressed concerns that when reports were placed on RAMIS they are not being notified, so compliance issues are being missed. CJ to see if an automatic email / notification can be sent to Headteachers when a report is added that clearly indicates a report regarding compliance has been uploaded. Due to so many notifications from RAMIS. Refresher training for caretakers on RAMIS to be provided. • HSE visit (non-schools) - a visit to LA building took place from the HSE, outcome that all contractors should be shown the Asbestos (LAMP) folder prior to starting work. This is legislation and should already be carried out. On Secondary facilities this would be done by the building manager. In the primary due to caretaker split shift contact, this is not always possible. Delegation would need to be agreed locally; the accountability lies with the Headteacher. Headteachers to see if this can be added to the sign in iPad so contractors sign to agree they have seen the LAMP

No	Discussion/Action
	<i>CJ left the meeting.</i>
5.	<p>School meals SLA <i>SR left meeting SJ took Chair.</i></p> <p>FP unable to join meeting AL to update.</p> <p>AL provided update on the below actions from previous meeting:</p> <ul style="list-style-type: none"> • Draft survey prepared which will be sent to all schools before Christmas to collate views regarding menu choices/waste/portion sizes, information will be collated and shared in January. Members received draft survey that will be sent to all primary and special schools Headteachers - members agreed content of survey with any further comments to be provided by the end of the week. • Portion sizes currently offered to FL/KS2 pupils to be reviewed further in line with the survey feedback - consider offering KS2 the top of the range allowed under guidelines. When survey results received the portion sizes, will be considered against each menu item. May be that portion sizes for Foundation Learning need to be reduced for some menu items as well as c considering KS2 portions. • Survey will include views of whether Headteachers want bread offered with every meal as allowed in regulations or only for hungry pupils as is the general practice. This will be agreed with each school locally, Headteachers know their individual pupils who require additional bread. • Should the trial of salad options in Edwardsville be successful, this can be rolled out to all schools. Currently looking at Edwardsville pilot and how it is implemented in other LAs. Will provide update when all areas considered including staffing, and waste. • Review options to put serving of vegetables with some meals such as curry into separate receptacles to avoid 'spoiling' food on the plate. SW advised that all pupils need to be offered / provided full meal to encourage pupils to try food they currently do not eat. Further discussion required regarding foods that could be put in separate receptacle but vegetables with curry meals is one example. • AL to speak with SW regarding current practice to serve the whole meal and approach re leftover food at the servery. SW agreed that if there is any food left over at the end of the service this can be given to pupils who are still hungry and not thrown away. This is not a universal offer for seconds but only for those at the end of service where there is leftover food. This will be agreed at a school-based level as will required schools to manage the equity of this depending on which year groups are present at the end of service. <p>SJ: Thank you for the update, approaches are sensible and give Headteachers some discretion</p>

No	Discussion/Action
	where they know the needs of their pupils. Further update to be provided to next working group in March.
6.	<u>Any other business</u> Next meeting 10 th March at 10:30am