



Cyngor Bwrdeistref Sirol
MERTHYR TUDFUL
MERTHYR TYDFIL
County Borough Council

SCHOOL BUDGET FORUM
Wednesday, 18th January 2023
(Microsoft Teams)

NOTES

PRESENT:

Keith Maher (Pen Y Dre High) - Chair
Sarah Hopkins (Blessed Carlo Acutis)
Owen Morgan (Cyfarthfa Park Primary)
Rhiannon Stephens-Davies (Greenfield Special)
Ryan Morgan (Taff Bargoed Learning Partnership)
Simone Roden (Ynysowen Community Primary School)
David Anstee (Ysgol Y Graig Primary)
Stuart James (Afon Taf)
Sue Walker (Director of Education)
Steve Jones (Chief Finance Officer)
Laurence Matuszczyk (Edwardsville Primary)
Paul Phillips (Pen-Y-Dre High)
Mike O'Neill (Pen Y Dre High)
Councillor A Barry (Cabinet Portfolio for Governance and Resources)

IN ATTENDANCE:

Joanna Lewis (LMS Manager)
Ian Kent (Group Accountant)
Gary Winston (Clerk to the Forum)
Councillor Michelle Jones (Portfolio Lead for Education)

APOLOGIES FOR ABSENCE:

Sarah Townsin (Ysgol Coed Y Dderwen)
Anthony Lewis (Head of School Planning, Support & Resources)

No	Discussion/Action
1.	<u>Welcome</u> The Chair welcomed everyone to the meeting and thanked them for their attendance.
2.	<u>Minutes</u> The minutes of the following meetings were agreed as a true record: <ul style="list-style-type: none">• 15th November - School Budget Forum• 16th December - School Budget Forum• 10th January - School Budget Forum Working Group
3.	<u>Matters arising from the minutes</u> 3.01 <u>15th November - Procurement</u>

No	Discussion/Action
	<p>LM: I raised an issue regarding the need to have an identifier number for every supplier and we need to know when they have been added to the list and wanted to make sure that this is recorded and looked into.</p> <p>3.02 <u>15th November - Motional Wellbeing</u> LM: Was the e-mail sent to schools? SW: Yes, but we are awaiting further information.</p> <p>3.03 <u>16th December - Revenue Settlement</u> Noted that the first point should be Merthyr Tydfil increase is 7.0%. The All-Wales average is 7.9% and Merthyr Tydfil is the 18th lowest in Wales.</p> <p>MO'N: Is there any further information on a voluntary early retirement package? SJ: A decision has been made and this will be communicated to all staff shortly.</p>
4.	<p><u>SEN - Formula Funding IDP Transition</u> IK explained that a model to support the transition of SEN funding during the introduction of IDPs was considered by the Working Group. The proposed model looked at ALN figures for the last three years and the highest year would be used for funding in 2023/2024. This would mean that no school would suffer any reduction in funding.</p> <p>KM: It seems a sensible and pragmatic approach, the change to IDPs is a difficult process and to find a model which protects schools seems fair.</p> <p>RM: Welsh Government are seeking a reduction in funding across all schools but we are seeing an increase in some. The LA needs to monitor this in the new PLASC Data.</p> <p>DA: My school is showing an increase, but it seems to be an issue with SIMS, and it is being looked at.</p> <p>SR: It should be less but the needs in school are increasing so it may not be straightforward.</p> <p>OM: Do we need to reconsider if there are errors on SIMS, schools may be benefiting due to an error? IK: We can revisit the figures and adjust, if necessary, but are you happy with the model?</p> <p>It was agreed to accept the transitional model presented.</p>
5.	<p><u>Budget Reductions 2023/2024</u> KM: You would have all received an email which outlined the budget reductions we can expect as a result of the 5.15% cut to 2023/2024 budgets. I will ask Ian to provide further details and take any questions.</p> <p>IK: We presented two models to the Working Group on how we could achieve £2.5 million savings from the school budgets. The information that was circulated was based on the model preferred by the Working Group which was a 5.15% cut to all budgets but excluding the LRB funding from the process. The other option was based on pupil numbers and would have</p>

No	Discussion/Action
	<p>meant that some schools would have had higher levels of cut.</p> <p>LM: Could you explain how gas is procured please?</p> <p>IK: The LA has a procurement contract for gas supply, it is updated each month based on the current purchase price. So far, we have secured 82% of our supply for next year but 18% remains so that may mean that the final contract price will vary from what we know today.</p> <p>LM: So, the new formula allocation will include these new figures?</p> <p>IK: Yes, we have a model which is based on the estimated cost and anticipated school use.</p> <p>RSD: Option 2 would have benefited me, but I can see that option 1 is a fairer arrangement for most schools. The funding that I get is based on the level of staff support I need, and the safety of our pupils and these cuts may mean I will have to come back and seek extra funding.</p> <p>SH: It will have a massive impact on our education provision, schools have worked hard to implement the vision of RARS, and people need to realise that this will impact on our ability to deliver it and it is deeply worrying.</p> <p>SR: We are sending the wrong message if we just accept this and just lose staff to balance the budget. We should all go into a deficit position which would be a stronger message.</p> <p>PP: As an outsider to the education service, I find it curious that we only plan one year ahead. I have been working on the ALN Funding Review Panel and we all agreed that we should not implement lower funding. Politically, we will need to see if the current political party remains in power and whether there may be a change in thinking, and this could lead to increased funding. If we let staff go now and then the situation improves, we will want them back, what happens then? When we set our budgets for next year, can we consider it a short-term measure and plan accordingly?</p> <p>AB: It is the most difficult position, as a Cabinet, we have looked at the position again and we need to preserve our front-line services and we were 18th out of 22 local authorities in the level of increase and the more affluent areas in our country received the highest levels of increase which cannot be right and needs to be reviewed for future years. We met last night and it was felt that we could do more for schools and we are looking at options for reducing the £2.5 million cut to schools. I can't give any more details at this stage, but we are hopeful, and we will get back to you when we have more information.</p> <p>LM: I echo the comments made by the Headteacher colleagues and that AB for the information. My earlier comments about the wastage on what we pay contractors becomes more important, but I cannot personally agree to any cuts to the school budgets.</p> <p>MJ: We don't want to cut any money from the school budgets as we all know how important they are, we are working hard to find other ways of saving money and I want you to know that we are on your side and doing our best.</p> <p>KM: I thank you all for your comments today. The Council has been put in an invidious position and the issues on how we are funded by Welsh Government are correct. It is clear that the</p>

No	Discussion/Action
	<p>levels of cuts mentioned will have a significant impact on standards and wellbeing in all our schools and we hope our heartfelt concerns are heard. Do we need any further discussion on this item?</p> <p>GW: We need to agree a model for implementing any reductions and the level of cuts could then be applied to this model.</p> <p>JL: I agree with GW and we require a decision on the model today.</p> <p>SR: Have we examined every avenue for savings? Can I suggest the Central South Consortium - we spend a lot of money on that service, and we need to evaluate whether we get value for money.</p> <p>SW: That is something we are undertaking.</p> <p>KM: Can I take a vote on the proposed model based on a % cut to all schools.</p> <p>The model was agreed.</p>
6.	<p><u>Future Meetings</u></p> <p>The following meetings were agreed:</p> <p><u>School Budget Forum</u> Monday, 14th March at 10am Tuesday, 11th July at 10am</p> <p><u>School Budget Forum Working Group</u> Tuesday, 31st January at 10am Wednesday, 29th March at 10am Tuesday, 9th May at 10am Tuesday, 20th June at 10am</p>
7.	<p><u>Any other business</u></p> <p>LM: Can I suggest for further discussion that we look at the procedures for making payments from school budgets as there are still issues with non-authorised payments being taken?</p> <p>KM: Thank you, I will take advice as to whether it is something we can look at.</p> <p>JL: There is currently a piece of work being undertaken and we can feed this back.</p> <p>AB: It may be an area where an Education Procurement Workshop would be appropriate. We have used them in the Local Authority before and they have proved helpful.</p> <p>PP: It is something worth considering and if we can find ways of procuring goods and services cheaper it will benefit all.</p> <p>AB: I will speak to Sue Walker and Procurement to see how this can be taken forward.</p> <p>KM: In such challenging times it is worth exploring. May I thank Councillors, Officer, Heads and Chairs for their hard work during these challenging times and a further meeting will be held if necessary to receive any update on the budget cuts.</p>