



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

---

**SCHOOLS BUDGET FORUM WORKING GROUP**  
**Tuesday, 21<sup>st</sup> November 2023**  
**(Ynysowen Community Primary School)**

---

**NOTES**

<b>PRESENT:</b>	David Anstee (Ysgol Y Graig) - Chair Stuart James (Afon Taf High) Rhiannon Stephens Davies (Greenfield Special) Simone Roden (Ynysowen Community Primary)
<b>IN ATTENDANCE:</b>	Joanna Lewis (LMS Manager) Gary Winston (Clerk to the Forum) Hannah Brown (HR Service Manager) Item 3 only Glynis Estebanez (HR Admin Manager) Item 3 only
<b>APOLOGIES:</b>	Sarah Hopkins (Blessed Carlo Acutis) Owen Morgan (Cyfarthfa Park Primary) Alwen Bowen (Ysgol Rhyd Y Grug) Anthony Lewis (Head of School Planning, Support & Resources) Ian Kent (Education Accountant)

No.	Discussion/Action
1.	<p><b><u>Catering Services SLA</u></b></p> <p>Members discussed the Catering Services SLA and felt that the previous Working Group meeting had not addressed the key issues that most schools were concerned about.</p> <p>Discussion took place and the following areas of the service were identified as being a concern:</p> <ul style="list-style-type: none"><li>• The quality of food provided, portion sizes and choice.</li><li>• Provision of bread, salad and water.</li><li>• Lack of training for Breakfast Club staff including fire risk assessments.</li></ul>
2.	<p><b><u>Human Resources SLA</u></b></p> <p>Members welcomed Hannah and Glynis and thanked them for attending.</p> <p>The Chair explained that the purpose of the meeting was that we are approaching the end of the three-year SLAs and the School Budget Forum had requested that three services, including HR, be asked to attend a Working Group meeting to discuss any concerns.</p> <p>The Chair explained that schools viewed the SLA as two services - HR Administration and HR Advice. The general view of schools was that they are satisfied with the HR Admin Service and are pleased that they can get a quick response to issues and staff are generally helpful.</p> <p>There have been some issues with HR Advice, Heads have identified individual issues where they have concerns. In the case of Ysgol Y Graig Primary, we had a redundancy situation and in reflection, I believe that the process was too lengthy and resulted in unnecessary costs for the</p>

No.	Discussion/Action
	<p>school. The advice from HR seemed over cautious and risk averse. Is it possible that we could have advice from HR, at the start of the process, about the different options that would be available. This would give the Head the opportunity to consider what options there are and the risks associated with each. We also had a more recent example with a safeguarding issue and again the process seemed long and over complicated.</p> <p>SJ: I agree with DAs views, Admin Support has been good and Afon Taf have not had issues, but we have had serious concerns about some of the advice we have received. We had a case where a member of staff clearly struck a pupil and we had CCTV evidence to support this, but we were told to follow a long process which cost us almost £90,000 in salaries before that person left. In such cases, it must be more efficient to dismiss immediately and then address any issues later. We seem risk averse, and this is costly for the school and damages reputation.</p> <p>GE: Each case needs to be considered individually, if there are safeguarding issues it needs to follow the agreed process. Our advice is based on agreed processes and if we fail to follow it, then a Tribunal may decide that we pay a lot more.</p> <p>SJ: These costs would not fall on schools. Where we have all the evidence and it is a clear-cut case, we allowed the process to drag-out, they did not attend meetings even though we could evidence through social media that they were well and enjoying themselves. It makes us look ridiculous and is bad for the school.</p> <p><b>DA: Trade Unions will always try and drag-out a process and in a case like that it is clearly damaging the school's reputation. Do the Trade Unions always follow the legal guidelines, or do they dictate the process?</b></p> <p>HB: Every case is different, but we can look at that again.</p> <p>SJ: We are still risk averse and sometimes we need to make an immediate decision in clear-cut cases.</p> <p>SR: I think the issue with unions is important, we seem to take their views into account too much. We should focus on what is best for the school first.</p> <p>RSD: Im generally pleased with the HR Service, I've had a few issues recently and Donna has been very helpful. I've worked in other local authorities and their HR Service isn't as effective.</p> <p><b>SR: Schools would welcome the opportunity to have options when an incident happens.</b></p> <p>GE: We've had cases previously which have gone on for years having followed ACAS guidance and there are cases where cases we should be looking at the risks and weighing up the best option.</p> <p>DA: I think its important to have those discussions on the risks of different options.</p> <p><b>SR: We also need to look at policy where staff can have full pay for 6 months and 6 months half-pay. This is abused and often they come back then, and the problem hasn't been addressed.</b></p> <p>GE: Those arrangements are in the Green Book and are part of staffs' terms and conditions. It doesn't mean that we can't take action to address issues within that timescale.</p> <p>SR: I also have concerns about the advice given by Occupational Health. We have had examples when a person is perfectly well, but they use the system to prolong their absence.</p> <p>DA: I had a case when a member of staff was absent long-term with stress, the GP had signed her</p>

No.	Discussion/Action
	<p>off but OH said that she was not fit to return.</p> <p><b>SR: When referrals are made to OH it often feels that they are acting in the best interests of the member of staff and not the school. We have to pay for this and there seems a reluctance to challenge the individual.</b></p> <p>HB: I can follow-up that with the OH Team, their role is to get staff back to work as soon as possible.</p> <p>GE: If a case goes to Tribunal, we are asked to demonstrate how we have carried out our duty of care as employers, but we need to help them back to work as soon as possible.</p> <p>HB: The HR and OH should work closely together to manage staff back to work as soon as possible. I also wanted to mention that as you probably know, Glynis will be retiring in March and that we have reviewed our structures and have appointed a Relatives Employment Officer, and this person will have a clear role in ensuring this happens. Her name is Sian Jones, and she will work closely with schools. Im aware of the historic issues there have been with schools, and I want to develop a good relationship with schools, and I hope the new post will support this. I am also aware that Donna has been the main point of support for schools and there is a need for other officers to support her. We are building our team skills to ensure that we have additional support where necessary.</p> <p>JL: That will be important with the budget situation facing schools and the likelihood that many schools will be facing compulsory redundancies.</p> <p><b>SR: The HR policies also need to be looked at. They are too heavily influenced by the unions. When we showed our policies to our external HR provider, they felt that there were too many additional layers. This extends the process.</b></p> <p>GE: We have tried to have a positive relationship with unions and these extra layers often give opportunities to address issues before we enter the formal process.</p> <p><b>SR: I understand that, but it doesn't help when we always have to meet the costs.</b></p> <p>HB: Policies are necessary and are often good in theory, but sometimes dealing with a real situation is more difficult and doesn't always help. We are happy to discuss any issues and you are open to amending them if necessary.</p> <p>DA: May I take this opportunity to thank Glynis for her support which has always been helpful, and we get a quick response. It is also good to have someone we can discuss things with before taking any action.</p> <p>GE: That is an important part of the role, and it is important that an issue is discussed before decisions are made.</p> <p>DA: Having a 'sounding board' is really important and we need to have someone we discuss something openly with before something formally.</p> <p><b>SR: Does the SLA include a statement about expected response times?</b></p> <p>GE: Yes, it varies depending on the issue. We are generally good at meeting these targets but there will always be occasions that we are unable to because of staff absence, workload etc. Heads should not hesitate to contact me or another team member if they haven't had a response.</p> <p>HB: We have set up a 'sounding board' for LA managers and are considering doing something</p>

No.	Discussion/Action
	<p>similar for Headteachers.</p> <p><b>SR: I think that would be a good idea.</b></p> <p>DA: I agree. Thank you for attending and I think this has been helpful.</p> <p><i>GE and HB left the meeting.</i></p>
3.	<p><b><u>Other SLAs</u></b></p> <p><u>Creditors</u>            JL stated that we are awaiting feedback from Corporate on the issue raised.</p> <p><u>SLA Timetable</u>            Members noted that the timetable for reviewing SLAs had been disrupted by ASOS and that a number of services were subject to review. JL stated that the SLAs would need to be finalised by the end of January in order to go to governing bodies for approval in the spring term 2024. Members stated that this may be difficult given the on-going work and suggested that the current contracts could be extended by a year in order for a thorough review to take place. JL agreed to discuss the matter with Anthony Lewis.</p> <p><u>Building Servicing Costs</u>            SR queried how the funding for this was delegated.</p> <p>JL outlined how funding was divided between non-capital maintenance funding and general building maintenance funding. Service costs were included in the non-capital maintenance funding.</p> <p>Discussion took place and members requested clarity on what was included in the funding and whether it included any areas that should be LA responsibility.</p> <p>The Chair thanked everyone and closed the meeting.</p>