

**DIRECTORATE OF LEARNING AND SKILLS**  
**Schools Budget Forum**  
**Wednesday 8<sup>th</sup> June 2022**

**MEMBERS IN ATTENDANCE:**

Trevor Baker, Cllr. Rhiannon Birch, David Blackwell, Chris Britten, Vince Browne, Cedric Burden, Mairead Canavan, Norman Craggs, Tim Exell, Mari Gibbs, Rhodri Jones, Rhys Angell Jones, Lorraine Lancaster, Sian Lewis, Martin Price, Paula Vaughan, Terry Vaughan-Taylor, Sarah Jenkins Welch

**Also in attendance:** Matt Bowmer, Cllr. Lis Burnett, Rachel Cox, Lisa Lewis, James Mansfield, Nicola Monckton, Lisa Soderland

Item	Issue	Discussion	Action
1.	Welcome & apologies	Apologies from, Russell Bailey, Trevor Brown, Matt Gilbert, Ceri Hoffrock,	
2.	Minutes of previous meeting  Matters arising	Agreed as accurate  <b><u>Meeting to be requested with the Education Minister</u></b> Due to the pandemic and the election, there still has not been an opportunity to meet with the education minister.  <b><u>Budget Forum to present at cabinet</u></b> – TB to discuss with Cllr. Lis Burnett and Cllr. Rhiannon Birch the information required at Cabinet and appropriate timescales. It is assumed that Cabinet will want an update on planned use of school balances.	TB
3.	Budget Forum constitution and membership update	Cllr. Lis Burnett attended to explain the formation of the new administration. Cllr. Lis Burnett is now the Executive Leader of the Council and Cllr. Rhiannon Birch is the Cabinet Member for Education, (full title - Cabinet Member for Education, Arts and the Welsh Language).  Cllr. Lis Burnett explained that she will attend meetings as invited to discuss the budget in her capacity as Council Leader. The Forum thanked Cllr. Lis Burnett for her	

support to the Budget Forum and commitment to education over many years.

Cllr. Rhiannon Birch formally introduced herself as the new Education Cabinet Member, advised of her background in teaching and her aim to support the Budget Forum going forward. The Forum welcomed Cllr. Rhiannon Birch as the new Cabinet Member.

Ceri Hoffrock has stepped down as the Budget Forum representative for primary schools in the rural Vale. NM to contact the Chair of the Rural Vale Cluster to request an alternative primary representative.

Russell Bailey has stepped down as a governor representative on the Budget Forum. John Sparks has advised that a replacement representative will be sought at the next Vale Governors Association meeting.

Both Ceri and Russell are thanked for their contribution to the Budget Forum.

Matt Bowmer attended the Budget Forum to introduce himself as the new Head of Finance and Section 151 Officer for the Council. Matt will attend the November Budget Forum meeting as part of the budget setting process.

A Headteacher has raised a concern about the percentage of secondary schools that have school representation on the forum compared to the same percentage for primary schools. The Budget Forum membership follows the constitution which requires both primary and secondary school representation from

- Each geographical cluster
- Welsh Medium
- Voluntary Aided/Controlled Schools

It was noted that, as there are fewer secondary schools, there will naturally be a higher percentage of secondary representation if the forum is to ensure all these areas are represented.

It was noted in addition that in terms of overall pupils, the percentage of secondary and primary representation was equal.

4.	School Balances as at 31 <sup>st</sup> March 2022	<p>NM presented a report on the position of school balances carried forward at the end of the 2021/22 financial year and a spreadsheet identifying individual school balances over the last eight years.</p> <p>Between March 2015 and March 2019, school balances carried forward fluctuated between £2.3M and £2.9M, until balances dropped to £839k at the end of the 2019/20 financial year. In April 2020, there were real concerns that school balances could fall into an overall deficit position by the end of the 2020/21 year.</p> <p>However, a change occurred during the 2020/21 financial year as the result of the Covid 19 pandemic resulting in school balances rising by £5.47M to £6.3M in just one year. This 2020/21 increase in balances was caused by two factors, firstly the savings from the closure of schools due to the pandemic, and secondly increased grant income from Welsh Government.</p> <p>By the end of the 2021/22 financial year, school balances had risen by another £6.46M to £12.77M, which was largely driven by additional Welsh Government funding made available to schools.</p> <p>The following was noted</p> <ul style="list-style-type: none"> <li>• 91% of Primary/Nursery schools have a balance carried forward in excess of £50k.</li> <li>• All Secondary, Special and 3-9 schools had a balance carried forward in excess of £100k</li> <li>• No school outturned the financial year in a deficit (although one school was very close to doing so)</li> <li>• 95% of all schools have a balance carried forward in excess of 5% of budget share</li> <li>• 75% of schools have a balance carried forward in excess of 10% of budget share</li> </ul> <p>All schools with a balance carried forward in excess of 5% of budget share have been emailed a blank pro forma to complete titled "Planned Use of Balances". Each of these schools will be required to complete the form detailing how the excess balance will be utilised over the current and next financial years. All returns must be submitted by June</p>	
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		<p>30<sup>th</sup> 2022. TB has advised schools to include as much detail as possible.</p> <p>It was noted that</p> <ul style="list-style-type: none"> <li>• An additional £6.7M in grants was awarded to schools in the 2021/22 financial year, of which a £4.2M related to Covid recovery</li> <li>• Schools have had difficulty recruiting additional staff with grant funding due to a shortage of available supply and agency staff</li> <li>• Despite excessive balances accumulated through the Covid 19 pandemic period, schools are experiencing difficulties balancing in-year budgets and are relying on balances brought forward to balance current budgets. Many schools are therefore not in a sustainable budget situation.</li> </ul>	
5.	Increasing Energy Costs for schools	<p>The Budget Forum has requested that the Council provide an estimate for the increase in energy bills predicted for the next few years in the light of the current energy price crisis across the country to enable schools to financially plan for this pressure.</p> <p>NM has already requested information from the energy team which will be provided at the next budget forum.</p> <p>LL updated the forum on the decarbonisation and sustainability work that has been produced by the 21<sup>st</sup> Century Schools Team. LL to arrange a presentation at the next Budget Forum.</p> <p>LL advised that there may be limited Salix funding available for schools. The Salix scheme involves an interest free loan for capital works such as solar panels and energy lighting to reduce energy costs and emissions. Schools to contact Mark Biernacki or Ben Winstanley in the property section for information.</p>	<p>NM</p> <p>LL</p>
6.	Grants update 2022/23	<p>NM presented the information currently available with regards to grants for the 2022/23 financial year.</p> <p><b><u>Covid Hardship Grant</u></b></p> <p>The Covid Hardship Grant ended in March 2022. Where a risk assessment determines that a pregnant member of staff (post 26 weeks) cannot be in school, there is central funding available to cover backfilling costs.</p>	

### **Pupil Development Grant (PDG)**

Welsh Government has not yet provided the PDG grant allocation to the Central South Consortium. For preparing budgets, schools are using the previous year PDG allocations as an estimate.

### **Regional Consortium School Improvement Grant (RCSIG)**

The Central South Consortium (CSC) has published RCSIG allocations on the CSC website for the 2022/23 financial year. The RCSIG funding formula is driven by 2022 plasc. The formula is calculated as follows

	<b>Lump Sum</b>	<b>Pupil Rate</b>
Nursery	£3,615	£39.40
Primary	£6,790	£39.40
Middle	£14,899	£39.40
Secondary	£14,899	£39.40
Special	£11,284	£123.63
PRU	£11,284	£123.63
Foundation Phase	n/a	£548.10
14-19	n/a	£114.22

### **Accelerated Learning (Recruit Raise Standards and Recover)**

A total of £1.493M has been allocated to schools under the Accelerated Learning Grant for the 2022/23 financial year to support the Ministers “Recruit, Raise Standards and Recover” agenda following the pandemic. Individual allocations have been emailed to schools.

### **Post 16 Learner Recovery and Progression Funding**

Schools with sixth forms have been allocated £400,787 to assist with post 16 learner recovery following the pandemic. Schools have been emailed individual allocations.

### **Post 16 Transition Funding**

Schools have been allocated £78,649 to support learners in years 11,12 and 13 progress to their next phase of

		<p>education. Schools have been emailed individual allocations.</p> <p><b><u>NQT Funding Scheme</u></b> The NQT grant has been extended until the end of the summer term, schools are advised to use Accelerated Learning Grants to retain staff where possible.</p> <p><b><u>Reducing Infant Class Sizes grant</u></b> This grant will come to an end in August 2022.</p> <p><b><u>Professional Learning Grant</u></b> The Central South Consortium has indicated that this grant will be available this year however the level of funding has not been advised. TBC</p> <p><b><u>ALN New System Funding</u></b> This grant of £179,207 has been awarded to schools to support the phased commencement of the ALN act. Schools have been emailed allocations.</p>	
7.	Welsh Government Statistics – Local Authority Budgeted Expenditure on Schools	<p>DB presented the 2021/22 Welsh Government statistics, <b>Local Authority Budgeted Expenditure on Schools</b> to the forum.</p> <p>It was noted that pupils in the Vale of Glamorgan continue to be funded at the lowest in Wales at £726 per pupil below the Welsh average and significantly below neighbouring Authorities such as Bridgend, Rhondda Cynon Taff, Newport and Cardiff; or Local Authorities with similar characteristics such as Wrexham.</p> <p>NM advised that the 2022/23 statistics are not yet available. NM to circulate prior to the next meeting.</p>	NM
8.	Budget Forum Programme of Work for 2022/23	<p>It was decided that the following items will be prioritised for the 2022/23 Budget Forum Programme of Work</p> <ul style="list-style-type: none"> <li>• Welsh Government Funding Challenge to seek equitable education funding per pupil across Wales</li> <li>• Continuation of ALN funding review to ensure equitable distribution of ALN funds to schools in the Vale of Glamorgan</li> </ul>	

9.	Any other Business	<b><u>School Budget Submission 2022/23</u></b> The forum was reminded that school budgets must be submitted to the Learning and Skills Finance team by June 30 <sup>th</sup> 2022.  <b><u>Next Meeting</u></b> 14 <sup>th</sup> September 9.30am, Microsoft Teams	
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