

DIRECTORATE OF LEARNING AND SKILLS

Schools Budget Forum

Wednesday 14th June 2023

MEMBERS IN ATTENDANCE:

Trevor Baker, David Blackwell, Chris Britten, Mairead Canavan, Peter Cate, Tim Exell, Mari Gibbs, Cllr. Emma Goodjohn, Sarah Jenkins, Rhodri Jones, Rhys Angell Jones, Martin Price, Terry Vaughan-Taylor

Also in attendance: Rachel Cox, Elaine Crapnell, David Davies, Lesley Evans, Gemma Gulwell-Jones, Liz Jones, Lisa Lewis, James Mansfield, Nicola Monckton, Emma Ryles, Lisa Soderland, Joanna Ware,

Item	Issue	Discussion	Action
1.	Welcome & apologies	Apologies from Cllr. Rhiannon Birch, Trevor Brown, Vince Browne, Norman Craggs, Ruth Foster, Matt Gilbert, Lorraine Lancaster, Jonathan Ling, Colin Smith, Paula Vaughan	
2.	Election of Chair and Vice Chair	David Blackwell was elected as Budget Forum Chair and Norman Craggs was elected as Vice Chair. Nominations were received from Chris Britten and seconded by Martin Price.	
3.	Minutes of previous meeting Matters arising	Agreed as accurate. <u>Special School Funding Review</u> – On the agenda. <u>Feedback to 23/24 budget proposals</u> – Dave Blackwell passed on the Head of Finance Matt Bowmer, all concerns and queries from Budget Forum members regarding the 2023/24 revenue budget report.	
4.	Budget Forum membership and constitution	The Budget Forum constitution and membership was shared with the forum.	

		<p>The Chair welcomed new members to the budget forum, Jonathan Ling (Cowbridge Comprehensive School), Ruth Foster (Evenlode Primary School) and Peter Cater (Governor Jenner Park Primary School).</p> <p>The Chair wishes to thank Vince Browne for his contribution to the Schools Budget Forum over many years, in particular his contribution to the Welsh Government Funding Challenge for better funding for Vale of Glamorgan pupils.</p>	
5.	Budget Forum Programme of Work 2023/24	<p>The Budget Forum Programme of work for the 2023/24 financial year was agreed as follows:-</p> <ol style="list-style-type: none"> 1. Continuation of the WG funding challenge for fair funding for pupils in the Vale of Glamorgan compared to the rest of Wales. 2. Review of the Special Schools Funding Formula 3. Review of the Additional Needs pooled fund for primary schools. <p><u>Additional Needs Fund Review</u> - David Davies and Liz Jones updated the Forum on the need to review the pooled Additional Needs Fund for Primary Schools. David Davies will email the ANF panel Head teachers to ask them to form a task and finish group to review the fund.</p>	DD
6.	School balances	<p>Nicola Monckton presented information on school balances carried forward at the end of March 2023, in addition to historical data going back to March 2015.</p> <p>School balances were ranging between £2M and £3M for a number of years until March 2020 when balances dipped to £839,000 overall, when at this point there was concern that a number of schools could fall into a deficit position in the following years. However, throughout the Covid 19 pandemic, school balances increased significantly as a result of school closures and large amounts of additional grant funding made available by Welsh Government. By March 2021 school balances had reached £6.3M, and by March 2022 £12.8M.</p> <p>At the end of the 2022/23 financial year (March 2023), school balances had reduced by just over £6M to £6.7M, which is the largest reduction in school balances seen in recent years.</p>	

		<p>Nine schools ended the 2022/23 financial year in a deficit position, one secondary school and 8 primary schools. Deficits ranged from £6,000 to £588,000.</p> <p>At the end of the 2022/23 financial year there were 32 schools with balances remaining in excess of 5% of budget share, and 10 schools with balances in excess of 10% of budget share.</p> <p>The deadline for the submission of 2023/24 balanced budgets and recovery plans is June 30th. Until all budgets are received, and signed off by Governing bodies, the projected position with regards to the projected outturn for schools at March 2024 cannot be reported.</p> <p>NM to circulate to the Budget Forum, the projected outturn of schools following the receipt of all authorised budgets prior to the September meeting.</p>	NM
7.	Grants update	<p>Nicola Monckton circulated a document regarding grant funding verified for the 2023/24 financial year.</p> <p>Schools have been advised of allocations under the following grants:</p> <ul style="list-style-type: none"> • Accelerated Learning Grant • Post 16 Grant • Post 16 Transition Grant • Pupil Development Grant • Regional Consortia School Improvement Grant • Professional Learning Grant • Teachers Pay Grant (for Sept 22 award) • ALN Implementation Grant • Consortium Collaboration Funding <p>Notification has not yet been received with regards to</p> <ul style="list-style-type: none"> • Post 16 Learner Progression • Pupil Development Grant for Children Looked After (CLA) <p>The forum was also updated on any notifications received to date of centrally administered education grant funding.</p> <p>Chris Britten raised a concern about the time delay in receiving notification of the PDG CLA grant, and the level of paperwork involved in the bidding process. Trevor Baker advised that this issue had already been raised with the Central South Consortium.</p>	

8.	Special Schools funding formula review	<p>Liz Jones updated the Forum on the plans to review the Special school funding formula and advised that a task and finish group would be established including representatives from the mainstream sector.</p> <p>The working group will include Liz Jones, David Davies, Chris Britten and Rhys Angell Jones, with support from Nicola Monckton. NM will email mainstream schools to seek volunteer Head teachers to be part of the group. Liz Jones will bring an update on the progress of the review to the next Budget forum.</p>	<p>NM</p> <p>LJ</p>
9.	Schools Funding Formulae	<p>Nicola Monckton Circulated the both the Mainstream Schools and Special School funding formula to the group. The only major change was the introduction of the efficiency saving for schools.</p>	
10.	AOB	<p>Additional funding for ALN in mainstream schools Trevor Baker advised the forum that the Council has now closed its 2022/23 accounts and has out-turned with and underspend against the 2022/23 overall budget. £850,000 of this underspend has been earmarked for ALN in mainstream schools. This funding will be allocated to mainstream schools via a formula.</p> <p>Big Fresh Catering Company (BFCC) Profit share Trevor Baker updated the forum that the Big Fresh Catering Company made a profit in the 2022/23 financial year and as a result £300k will be given back to Vale of Glamorgan schools. All schools that were with the BFCC in 22/23 will receive a profit share of £4k. In addition a further £100k is available for schools to bid on for specific schemes.</p> <p>Vale Schools Governors Association progress with regards to Education Funding campaign Martin Price updated the Forum on the work that is currently underway by the Vale School Governors Association with regards to education funding from Welsh Government. There will be a VGSA update at the Learning and Culture Scrutiny committee on 15th June 2023 regarding this work.</p> <p>VSGA is not criticising the Vale Council, but seeking equity of Welsh Government funding to schools in the Vale.</p>	

1. VGSA are working collaboratively with other Governor Associations across Wales on a petition method with the aim to raise enough signatures to trigger a debate at the Senedd regarding the funding of Education Across Wales.
2. The VGSA are also in discussion with lawyers over whether a judicial review could be actioned regarding the impact on the Vale of Glamorgan of the WG formula for funding Education which results in the Vale of Glamorgan pupils being funded significantly below the Welsh Average. A judicial review would focus on the factors within the formula that are over 30 years old, and also the equity of the formula which creates a postcode lottery meaning that funding is determined on where pupils live and not on the actual cost of education. There is precedent here because post 16 education and Flying Start are both funded by Welsh Government on a per learner basis.

Next meeting dates – All occur on Wednesday mornings, 9.30am on Microsoft teams.

- September 20th 2023
- November 29th 2023 (invitation to the leader, the Head of Finance and the Chief Executive)
- March 6th 2024