

Public Document Pack

Cabinet

Meeting Venue
By Teams

Meeting date
Tuesday, 15 December 2020

Meeting time
10.00 am

For further information please contact
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County Hall
Llandrindod Wells
Powys
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9/12/2020

Mae croeso i chi siarad yn Gymraeg neu yn Saesneg yn y cyfarfod.
Rhowch wybod pa iaith rydych am ei defnyddio erbyn hanner dydd, ddau ddiwrnod
gwaith cyn y cyfarfod.
You are welcome to speak Welsh or English in the meeting.
Please inform us of which language you wish to use by noon, two working days
before the meeting.

AGENDA

1.	APOLOGIES
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To receive apologies for absence.

2.	MINUTES
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To authorise the Chair to sign the minutes of the last meeting held as a correct record.

(Pages 5 - 6)

3.	DECLARATIONS OF INTEREST
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To receive any declarations of interest from Members relating to items to be considered on the agenda.

4.	NEWTOWN PRIMARY SCHOOL (HAFREN & LADYWELL GREEN SCHOOLS) STRATEGIC OUTLINE CASE (SOC)
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To consider a report by County Councillor Phyl Davies, Portfolio Holder for Education and Property.

(Pages 7 - 102)

5.	MOUNT STREET INFANT SCHOOL, MOUNT STREET JUNIOR SCHOOL AND CRADOC CP SCHOOL - PROPOSAL
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To consider a report by County Councillor Phyl Davies, Portfolio Holder for Education and Property.

(To Follow)

6.	WELSH MEDIUM EDUCATION STRATEGY
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To consider a report by County Councillor Phyl Davies, Portfolio Holder for Education and Property.

(Pages 103 - 140)

7.	AMENDMENTS TO THE SCHOOL FUNDING FORMULA
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To consider a report by County Councillor Phyl Davies, Portfolio Holder for Education and Property and County Councillor Aled Davies, Portfolio Holder for Finance.

(Pages 141 - 174)

8.	DEED OF VARIATION OF LEGAL AGREEMENT FOR SCHOOL IMPROVEMENT THROUGH REGIONAL WORKING (ERW)
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To consider a report by the Head of Legal and Democratic Services.

(To Follow)

9.	AMENDMENTS TO SCHEDULE 4 OF THE GROWING MID WALES PARTNERSHIP INTER AUTHORITY AGREEMENT
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To consider a report by the Head of Legal and Democratic Services.

(To Follow)

10.	REGIONAL HEALTH BOARD HEALTH AND CARE FACULTY
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To consider a report by County Councillor Myfanwy Alexander, Portfolio Holder for Adult Social Care, County Councillor Rachel Powell, Portfolio Holder for Young People and Culture, County Councillor Graham Breeze, Portfolio Holder for Corporate Governance, Engagement and Regulatory Services and County Councillor Phyl Davies, Portfolio Holder for Education and Property.

(Pages 175 - 198)

11.	EXEMPT ITEMS
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The Monitoring Officer has determined that category 3 of the Access to Information Procedure Rules applies to the following items. His view on the public interest test (having taken account of the provisions of Rule 14.8 of the Council's Access to Information Rules) was that to make this information public would disclose information relating to the financial or business affairs of any particular person (including the authority holding that information).

These factors in his view outweigh the public interest in disclosing this information. Members are asked to consider these factors when determining the public interest test, which they must decide when considering excluding the public from this part of the meeting.

12.	VALUING DOMICILIARY CARE
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To consider a report by County Councillor Myfanwy Alexander, Portfolio Holder for Adult Social Care.

(Pages 199 - 242)

13.	RESOLUTION OF CONTRACTUAL ISSUES WITH HEART OF WALES PROPERTY SERVICES (HOWPS)
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To consider a report by the Head of Legal and Democratic Services and the Head of Housing and Community Development.

(Pages 243 - 246)

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**MINUTES OF A MEETING OF THE CABINET HELD AT BY TEAMS ON TUESDAY,
24 NOVEMBER 2020**

PRESENT

County Councillor M R Harris (Chair)

County Councillors MC Alexander, G Breeze, A W Davies, R Powell and I McIntosh

1.	APOLOGIES
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Apologies for absence were received from County Councillors Phyl Davies and Heulwen Hulme.

2.	MINUTES
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The Leader was authorised to sign the minutes of the meetings held on 3rd and 10th November 2020.

3.	DECLARATIONS OF INTEREST
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There were no declarations of interest reported.

4.	COUNCIL TAX BASE FOR 2021-2022
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Cabinet considered the Council Tax base for 2021-22. Cabinet was advised that the estimated collection rate was 98.4%, a reduction of 0.1% to that used within 2020-21 calculation. This had been reduced having regard to the current on-going pandemic and impact this would have on collection of Council Tax during 2021-22.

RESOLVED

- 1. That the calculation of the Council Tax Base for the whole of its area for the year 2021-22 of 62,584.26 be approved, and**
- 2. That the calculation of the Council Tax Base for each Town and Community Council contained within 4.2 of the report, be approved to meet the legal requirement of the Council to set a Council Tax Base for 2021-22.**

5.	SCHOOL BUDGETS 2020-21
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Cabinet considered a report on school budget positions for 2020-21. Cumulative school deficits had been recognized as a significant risk to the Authority's finances and had been highlighted as a significant concern by Estyn Warning notices had been issued to schools projecting deficits of greatest concern in July

2019 and since then these schools had been working with Schools Service, Challenge Advisers, HR and Finance officers to put recovery plans in place to improve their budget positions. Whilst the Covid-19 pandemic had impacted on the delivery of recovery plans, the co-operation between Governing Bodies, Headteachers and officers of the Authority and the additional funding put into schools by the Cabinet was starting to show benefits. As at 31st March 2020 the total cumulative reserve for schools was in a deficit position of £910k, an in-year improvement of £2,258m on the position in May 2019. All bar one of the secondary schools were close to breaking even and there were plans to invest in and reconfigure that school.

Cabinet noted the report and commented that grants should be considered cautiously when included in schools budget plans.

6.	TREASURY MANAGEMENT QUARTER 2 REPORT
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Cabinet considered the Treasury Management report for the second quarter of 2020/21. The Head of Finance reported that the council did not currently hold significant levels of investment as interest rates were so low, the Council was currently using cash to support the capital programme rather than undertaking borrowing and incurring additional cost.

RESOLVED that the report be received.

7.	DELEGATED DECISIONS
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Cabinet received for information details of delegated decisions taken in the last two months.

8.	EXEMPT ITEMS
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RESOLVED to exclude the public for the following item of business on the grounds that there would be disclosure to them of exempt information under category 3 of The Local Authorities (Access to Information) (Variation) (Wales) Order 2007).

9.	PARTNERSHIP WORKING IN BRECON
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Cabinet considered the confidential report.

RESOLVED to approve the recommendations in the report.

County Councillor M R Harris (Chair)

CYNGOR SIR POWYS COUNTY COUNCIL.

CABINET EXECUTIVE
15th December 2020

REPORT AUTHOR: County Councillor Phyl Davies
Portfolio Holder for Education and Property

REPORT TITLE: Newtown Primary School (Hafren & Ladywell Green Schools) Strategic Outline Case (SOC)

REPORT FOR: Decision

1. Purpose

1.1 This report requests Cabinet approval for the following:

- a) To submit a Strategic Outline Case (SOC) to the Welsh Government's 21st Century Schools Programme for investment to develop:
- A new 270 place English-medium primary school to replace the current buildings of Hafren Junior School and Ladywell Green Infant School.

1.2 The cost of the preferred way forward is estimated to be £12,921,251 including *8% Risk and 24% Optimism Bias, which is acceptable at SOC stage, and will be mitigated as the business case process continues into the next stages. The funding is allocated for this project in the Council's Band B 21st C Schools Programme.

Welsh Government contribution 65%	£8,398,813
PCC 35%	£4,522,438
Total	£12,921,251

1.3 The report is supported by the following appendices:

Appendix A – Newtown SOC
Appendix B – Integrated Impact Assessment

2. Background

Strategy for Transforming Education in Powys

2.1 On the 14th April 2020, a new Strategy for Transforming Education in Powys was approved by the Leader via a delegated decision.

2.2 The Strategy was developed following extensive engagement with a range of stakeholders during two separate periods between October 2019 and March 2020. The Strategy sets out a new vision education in Powys, as follows:

'All children and young people in Powys will experience a high quality, inspiring education to help develop the knowledge, skills and attributes that will enable them to become healthy, personally fulfilled, economically productive, socially responsible and globally engaged citizens of 21st century Wales.'

2.3 The new strategy also sets out a number of guiding principles which will underpin the transformation of education in Powys. These are as follows:

- *A world class rural education system that has learner entitlement at its core*
- *Schools that are fully inclusive, with a culture of deep collaboration in order to improve learner outcomes and experience*
- *A broad choice and high quality of provision for 14 – 19 year old learners, that includes both academic and vocational provision, meeting the needs of all learners, communities and the Powys economy*
- *Welsh-medium provision that is accessible and provides a full curriculum in Welsh from Meithrin to age 19 and beyond*
- *Provision for learners with Special Educational Needs (SEN)/Additional Learning Needs (ALN) that is accessible as near to home as is practicably possible, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential*
- *A digitally-rich schools sector that enables all learners and staff to enhance their teaching and learning experience*
- *Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community*
- *Early years provision that is designed to meet the needs of all children, mindful of their particular circumstances, language requirements or any special or additional learning needs*
- *Financially and environmentally sustainable schools*
- *The highest priority is given to staff wellbeing and professional development*

2.4 The new strategy sets out a number of Strategic Aims and Objectives, to shape the Council's work to transform the Powys education system over the coming years. One of the Strategic Aims of the Strategy is to 'improve learner entitlement and experience'. Within this aim, the Strategy sets out a Strategic Objectives to 'Develop a network of all-age schools based around the 13 current secondary school locations'.

- 2.5 The strategy also includes a Strategic Aim to *'improve access to Welsh-medium provision across all key stages'*. Within this aim, the Strategy sets out Strategic Objectives to *'Move schools along the language continuum'* and to *'Develop new primary and secondary provision'*.
- 2.6 In addition, the strategy includes an enabling action to implement *'a major capital investment programme that will ensure that schools in Powys have inspiring, environmentally sustainable buildings that can provide opportunities for wider community activity, including where possible childcare services, early years, ALN, multi-agency support and community and leisure facilities.'*

The Case for Change

- 2.7 This project is the first phase of a wider Schools Transformation Programme for Newtown.
- 2.8 Ladywell Green Infants School and Hafren Junior School are located in Newtown. Ladywell Green provides education for pupils aged 4-7 years whilst Hafren Junior School provides education for pupils aged 8-11 years. They are amongst the last four infant and junior schools in Powys – the Council has been moving away from this model of education for some years in order to ensure that pupils aged 4 – 11 receive a seamless primary education.
- 2.9 On the 3rd March 2020, Cabinet approved the amalgamation of the two schools to create a new primary school which will open in September 2021, and will operate from the existing sites of both schools.
- 2.10 The schools are co-located in the centre of Newtown. However, the existing school buildings are in a relatively poor state of repair. Both schools are currently under capacity and it is predicted that combined demand will remain roughly at the same levels for the foreseeable future.
- 2.11 The condition of the existing school buildings is a cause for concern. Ladywell Green has an assessment of category C/D, and Hafren is classified as category C. A disproportionate amount of time is spent managing the building defects and there is a significant and constant need for repair; for example, both school rooves are in poor condition, each needing fairly urgent replacement, and this contributes to a general sense of their being very energy inefficient buildings. All of which leads to the assets proving costly, in terms of time and finance.
- 2.12 There is also the question of suitability. Whilst both schools are classified as category B, there are still question marks about their ability to facilitate delivery of a modern curriculum. The buildings are from the 1960s/1970s and it is felt that the design is not appropriate to meet the needs of a 21st Century curriculum, and to meet the well-

being needs of pupils. This is particularly pertinent, because the area is fairly deprived and there are behavioural challenges, which can be exacerbated by the lack of space.

- 2.13 There are also safeguarding issues as a result of the way the existing buildings have been designed and constructed, for example there are no barriers in place. There seems to have been no real site masterplan in place when the schools were originally built. In addition, the access road between the two school buildings is problematic. This makes managing 'parent flow' (i.e. at school start and end times) difficult. This is an issue which would be addressed by having a single school building.
- 2.14 Culturally, the buildings also present some obstacles. Upon merger, two buildings would not readily bring a one school ethos, for example. It is also desired for a 21st Century fit for purpose building to provide scope for further engagement with the community and, one opportunity for this would be to let space which can be utilised for non-school activities and clubs, helping to generate a more cohesive bond between school and community. It also presents the likelihood of associated income to offset some of the running costs. The existing buildings do not provide the scope to do this.
- 2.15 Overall, the site is not currently living up to its potential. The buildings are not fit for purpose and it is felt that the children deserve better facilities.

North Powys Wellbeing Programme

- 2.16 The development of the new school to replace Hafren and Ladywell Green schools is an integral part of the North Powys Wellbeing Programme (NPWP). A Programme Business Case (PBC) for the North Powys Wellbeing Programme was recently approved by the Council's Cabinet and will be considered by the Welsh Government over the coming months.
- 2.17 The Programme intends to create a collaborative, multi-agency wellbeing campus (the "Campus") for the population of north Powys, delivered by the North Powys Wellbeing Programme (NPWP). The Programme, established in 2019, is a once in a generation opportunity to bring together partner organisations to enhance and transform the way services are delivered to the local community.
- 2.18 The PBC demonstrates the ambition across partner organisations to develop a new integrated model for the area, bringing partners together across education, health and social care, housing, community and third sector, with opportunities for further linkages to leisure, police and ambulance services. It will also maximise wellbeing and leisure opportunities via essential links with green spaces through Open

Newtown and collaborative working with partners in the Third Sector and local business.

- 2.19 A core aim of the programme is to provide significantly improved and enhanced local services, delivered from a single location in Newtown within sustainable and fit-for-purpose accommodation. This approach will maximise efficiency, integration and innovation across multiple sectors which will represent significant benefits for the local community, including a wider range of services being delivered in county.
- 2.20 The preferred site for the new campus is known as the 'Park' area of Newtown, which includes Hafren and Ladywell Green Schools. Following the development and approval of the PBC, each element within the Programme (education, health & social care, infrastructure) will then develop its own SOC.
- 2.21 It is envisaged that the phasing will be as follows:
- Infrastructure (which will unlock the site for subsequent projects, but specifically for the immediate requirements of the school given the timeline requirements)
 - School
 - Housing/Community Development/Library (to be confirmed)
 - Health and Social Care
- 2.21 However, it will be dependent on the production of the masterplan and ability to fund and decant.

The Strategic Outline Case (SOC)

- 2.22 The SOC has been developed in accordance with HM Treasury's Five Case Business Model. The five 'cases' are:
- Strategic Case (The Case for Change)
 - Economic Case (Options to address the issues raised in the case for change)
 - Commercial Case (Procurement routes)
 - Financial Case (high-level indicative costs)
 - Management Case (how the project will be managed)
- 2.23 A wide range of options for the project have been considered when developing the SOC. These are outlined in pages 32-38 of the SOC, which is attached as Appendix A.

The Preferred Way Forward

- 2.24 Following an appraisal of options against the identified Investment Objectives and Critical Success Factors, an Economic Appraisal of shortlisted options and a Financial evaluation, the emerging preferred option for the Newtown primary school is as follows:

Option 4: Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site

Advantages and Disadvantages of the preferred way forward

Advantages	Disadvantages
<ul style="list-style-type: none"> • Achieves school re-organisation at Ladywell Green Infant and Hafren Junior schools; • Enables the educational advantages afforded through continuity of delivery from Foundation Stage through to the end of Key Stage 2; • Larger school enables economies of scale in procurement for the school governing body; • Provides 21st Century School facilities for Ladywell Green Infant and Hafren Junior School pupils • Creates a new Primary School which enables alignment with PCC education strategy; • Delivers a new build school which extends the time horizon for the requirement for substantial future works into the long term; • Continuity of education on Junior School site; • Removes backlog maintenance of circa £2.9M; • Will enable energy efficiencies reducing the buildings carbon footprint and ongoing running costs; • Creates financial efficiencies in school staffing structure • Frees up the other elements of the site to be used by partners in the North Powys Programme. 	<ul style="list-style-type: none"> • Disruption to existing school setting during building work; • Would require temporary relocation of Infant and Junior School pupils during building work and associated costs of this; • Larger capital investment required.

3 **Advice**

- 3.1 The advice of officers is that the SOC should be submitted to Welsh Government for approval, to enable the Council to proceed with the project and progress to the next stage of the business case process. This will also enable the North Powys Wellbeing Programme to move forward.
- 3.2 The Welsh Government's intervention rate for schools within Band B of the 21st Century Schools programme is 65%, which represents good value for money for the Council. Cabinet is advised that there is a significant early stage risk contingency of 25% within the estimated project costs, which is appropriate at a SOC stage. More detailed estimated costs will be confirmed at Full Business Case stage.
- 3.4 **Indicative Timescales**

Date	Actions (commencement)
04/2022	RIBA Stages 0 -2 completed
10/2022	RIBA Stage 3 (Spatial Coordination) completed
03/2023	Complete RIBA Stage 4 (Technical Design)
04/2023	Tender documentation issued
07/2023	Construction Commences
06/2024	Construction completed
07/2024	School handover
09/2024	New Primary School opens

4. **Resource Implications**

- 4.1 Estimated costs are as follows:

Project Costs	
Capital Cost	£9,765,626
Optimism Bias	£2,103,750

Risk	£1,051,875
VAT (only to be included where non-recoverable by applicant)	N/A
Total Project Cost (inclusive of optimism bias and risk)	£12,921,251
Welsh Government Contribution (65%)	£8,398,813
PCC Contribution (35%)	£4,522,438

- 4.2 The project is included within the current 21st Century Schools Programme funding envelope.
- 4.3 The current 21st Century Schools grant conditions allow Welsh Government to claw back grant if the school has over 15% surplus capacity 5 years after occupation of the school. The capacity of these facilities is in excess of the pupil numbers, so this remains a risk to this scheme.
- 4.3 The attached SOC identifies a potential revenue saving of £73,081 per annum through the delegated funding formula. There would then be an additional estimated saving of £22,320 which is the net saving on premises and the additional cost of rates following a move to the new build. Any change to the formula funding provided will impact on the Council's revenue budget.
- 4.4 Development and implementation of the proposal would require involvement from a number of service areas, including staff from the Schools Service, Finance, Property, Highways and ICT, as well as close involvement with a range of other services and organisations, including the Powys Teaching Health Board.
- 4.5 The Head of Finance (Section 151 Officer) notes the content of the report and that the project is included within the schemes approved under Band B of the 21st Century Schools Programme.

5. Legal implications

- 5.1 Legal: The recommendation can be supported from a legal point of view
- 5.2 The Head of Legal and Democratic Services (Monitoring Officer) has commented as follows: "I note the legal comment and have nothing to add to the report".

6. Comment from local member(s)

- 6.1 Cllr David Selby: 'As a local member for an area where parents often choose this school for their children, I welcome this development. New

buildings are required for the school, and we should also welcome the potential co-location with the North Powys Wellbeing Hub.'

- 6.2 Cllr Daniel Rowlands: 'I am in favour of this paper as the two current buildings are in a poor state of repair. We want the children of Powys to experience a high quality education and a new building will go a long way to help facilitate this.'

7. Integrated Impact Assessment

- 7.1 An initial impact assessment of the preferred way forward is attached as Appendix B. The impact assessment considers the project's impact on the Welsh Government's well-being goals, as outlined in the Well-being of Future Generations Act.

The summary of the impact assessment is as follows:

'This impact assessment suggests that the impact would be positive. The development of a new building to replace the current Ladywell Green and Hafren buildings would address many issues related to the poor condition of the current buildings, ensuring that future pupils would be taught in facilities that are fit-for-purpose, improving their learner entitlement and experience. The new facilities would be fully DDA compliant, supporting learners with disabilities. The development is part of the North Powys Well-being Programme, providing further opportunities for integration between the school and other services, to have a positive impact on the health and well-being of pupils attending the school and their families.'

Should Cabinet approve continuing with the preferred option, the impact assessment will be regularly updated throughout the process to take account of any feedback received.

8. Recommendation

- 8.1 It is recommended that Cabinet approves the following:

To submit a Strategic Outline Case (SOC) to the Welsh Government's 21st Century Schools Programme for investment to develop:

- A new 270 place English-medium primary school to replace the current buildings of Hafren Junior School and Ladywell Green Infant School.

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Corporate Director: Dr Caroline Turner

CABINET REPORT TEMPLATE VERSION X

Strategic Outline Case:

Ladywell Green Infants &

Hafren Junior Schools

October 2020

Version 0.6







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0. Document Control

0.1 Version Control

Version	Status	Date	Author	Update
0.1	Draft	06/10/20	SL	Baseline Document and SOC template created
0.2	Draft	22/10/20	MH	Updated draft and detailed option appraisal
0.3	Draft	22/10/20	MH/SL	Further updates to Options Appraisal section
0.4	Draft	27/10/20	SA	First client review
0.5	Draft	29/10/20	MH/SL	Further edits following client review
0.6	Final Draft	05/11/20	MH	Final draft following final client review

1 Executive Summary

1.1 Strategic Case

The purpose of this Strategic Outline Case (SOC) is to present the case for investment for a project that seeks to create an improved learning environment, for pupils attending the Ladywell Green Infant and Hafren Junior Schools. This will be accomplished by merging the existing schools.

On 14 April 2020 Council approved the new Strategy for Transforming Education in Powys 2020-30, replacing the legacy School Organisation Policy 2018. The new Strategy sought to address a number of significant concerns raised by Estyn on the progress of the Council's school reorganisation, acknowledging a historical lack of political decision making and a deep scepticism amongst the teaching profession regarding the Council's political commitment to schools and to the delivery of the improvements that are needed.

In directly addressing these issues the new Strategy outlines:

- a new vision for education in Powys;
- a summary of the challenges faced by the education sector in Powys;
- a final set of guiding principles;
- strategic aims and objectives;
- a programme of activity;
- the legislative process;
- new monitoring arrangements.

The Strategy is supported by a new Strategic Outline Programme (SOP) for capital funding for school building projects to be phased over a ten-year period. The capital funding required to enable the strategy to be delivered has been estimated at £350m.

The cost of the preferred option in this Business Case is estimated to be £9,765,626 (excluding Risk and Optimism Bias).

The case for change with the proposed merger of Ladywell Green and Hafren schools is based on a desire to address a number of weaknesses in the existing school arrangements. These issues include the following:

- Both existing school buildings are in a poor state of repair, requiring constant and disproportionate amounts of time to manage defects;
- The buildings are 1960s/1970s and the design is out of touch for delivery of a modern curriculum, exemplified by:
 - Inefficient flow of rooms within the buildings,
 - Halls are too small for purpose,
 - No current multi-purpose sports area.
- There is a limited access to outdoor space for children to release their tensions;
- There are safeguarding issues as a result of the way the existing buildings have been designed and built, which makes it difficult to manage 'parent flow';

- Environmental and energy inefficiencies are evident;
- Existing buildings offer very limited scope for extra-curricular activity, thereby weakening community cohesion and no opportunity for creation of additional income.

Ladywell Green and Hafren schools are located on a large site, and benefit from a large amount of green space. This is sometimes used to host community events.

The benefits of incorporating community and sports facilities in school construction projects is reflected in the aforementioned Strategy for Transforming Education in Powys; which includes a commitment to ‘a major capital investment programme that will ensure that schools in Powys have inspiring, environmentally sustainable buildings that can provide opportunities for wider community activity, including where possible childcare services, early years, ALN, multi-agency support and community and leisure facilities’.

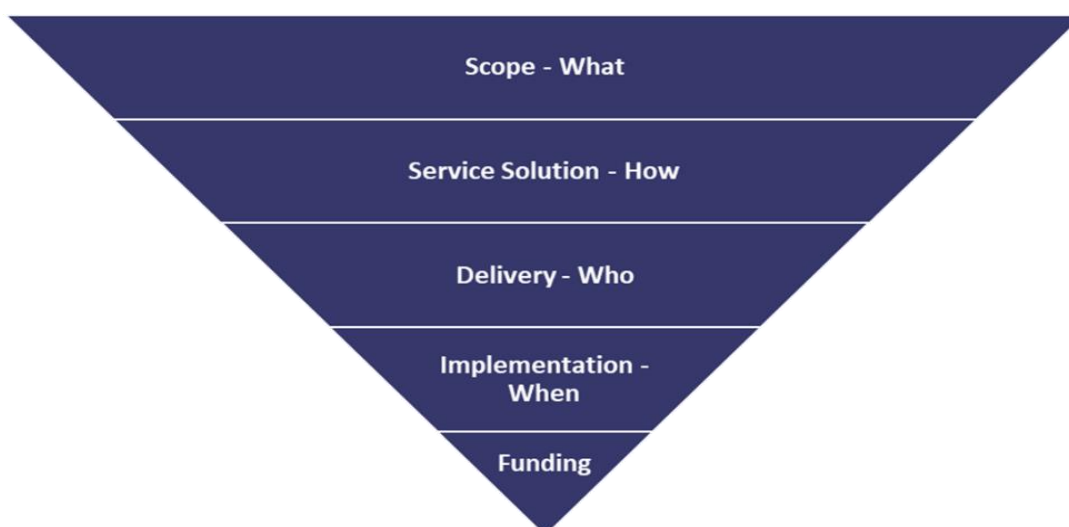
This proposed development will be in line with Building Bulletin and Sport Wales guidance. In addition, any construction project taken forward based on this SOC will be developed in line with the Welsh Government Active Travel Wales Act (2013) and design guidance, with the aim of improving active travel links.

The new approach is predicated on merging the existing schools, who currently share the same site location, in September 2021 and ultimately creating a new 270 pupil capacity school on that site with a planned opening date of September 2024.

This SOC is an integral part of the North Powys Wellbeing Programme (NPWP), which intends to create a collaborative, multi-agency wellbeing campus for the population of north Powys. This is a once in a generation opportunity to bring together partner organisations to enhance and transform the way services are delivered to the local community.

1.2 Economic Case

The approach to the constituents of the Economic Appraisal is best illustrated as follows:



Following an initial assessment of the of the scope of work required, a long list of options was developed within the remit of the scope by a cross departmental group of stakeholders at a workshop held on Thursday 13th October 2020:

- Do Nothing (backlog maintenance only) at Ladywell Green Infants and Hafren Junior schools (Minimum).
- Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school.
- Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school.
- Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site.
- Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school elsewhere in Newtown.
- Close the current Ladywell infants and Hafren junior School buildings and redistribute pupils to other primary age schools in Newtown.

Each of these options were subjected to a review of advantages and disadvantages and an appraisal against the Investment Objectives and Critical Success Factors agreed by the Powys officer team.

During the appraisal, it was clear that Option 1 (Do Nothing) did not sufficiently meet the Investment Objectives or Critical Success Factors, but was carried forward as a baseline comparator, in line with the guidance in the HM Treasury Green Book.

As a result of this, the following four options were short-listed for economic and financial appraisal:

- Do Nothing (Minimum). (Only c/f as a comparator).
- Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school.
- Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school.
- Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site.

The short-listed options were assessed over a 60-year period (30 years in the case of Option 1, Do Nothing), to understand the Net Present Cost (NPC) and Equivalent Annual Cost (EAC) of each option. As the assessment periods were not uniform, the Equivalent Annual Cost is deemed the main point of comparison between the options. The Economic Appraisal resulted in the following outcome:

DISCOUNTED CASHFLOW (DCF) SUMMARY SHEET					
Discounted Cash flow (DCF) Summary Sheet		Inc. Optimism Bias		Excl. Optimism Bias	
Option No.	Option Name/Description	NPC (£m)	EAC (£m)	NPC (£m)	EAC (£m)
Option 1:	Do Nothing	23.7	1.25	23.1	1.21
Option 2:	Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school	38.4	1.46	37.7	1.44
Option 3:	Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school	39.3	1.50	38.6	1.47
Option 4:	Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site	37.7	1.44	35.8	1.36

DCF = Discounted Cash flow
NPC = Net Present Cost
EAC = Equivalent Annual Cost

The economic appraisal shows that Option 1 (Do Nothing) is considered the best option economically, followed closely by Option 4, which has the best Net Present Cost and Equivalent Annual Cost of the other options. Option 1 (Do Nothing) has the best Net Present Cost, but this is because it has been assessed over a shorter period of time. Separately, Option 1 was only carried forward as a comparator, as it failed to meet a significant amount of the scheme Investment Objectives and Critical Success Factors.

1.3 Commercial Case

The Council has good experience of working with contractor frameworks and has achieved positive outcomes using such frameworks. The Council has therefore concluded that the optimum procurement route will be to use the revised SEWSCAP framework that was re-launched in June 2019 (SEWSCAP 3).

The new SEWSCAP Property Construction Framework is divided into the following lots:

- Lot 1: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby;
- Lot 2: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Torfaen County Borough Council, Blaenau Gwent County Borough Council, Monmouthshire County Council, Caerphilly County Borough Council or other Potential Employers based or operating near those areas;
- Lot 3: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Rhondda Cynon Taf County Borough Council, Merthyr Tydfil County Borough Council and Bridgend County Borough Council and any Participating Authorities based or operating near those areas
- Lot 4: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Vale of Glamorgan Council, The County Council of the City of Cardiff Council, Newport City Council or other Potential Employers based or operating near those areas;
- Lot 5: Provision of Construction services, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby to include new build
- Lot 6: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - All Potential Employers
- Lot 7: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£3,000,001 to £5,000,000) - All Potential Employers
- Lot 8: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£5,000,001 to £10,000,000) - All Potential Employers
- Lot 9: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£10,000,001 to £25,000,000) - All Potential Employers

- Lot 10: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£25,000,001 to £100,000,000) – All Potential Employers

In this instance the Council propose to use Lot 8 (£5M - £10M). The Core principles of the framework are the over-riding objectives guiding the Authority and the Contractor in the operation of this Framework Agreement, and in entering into and performing Call-Off Contracts.

1.4 Financial Case

A balance sheet asset addition of £9,765,626 is made for the new Primary school in Newtown. Short term additional funding is required of £9,649,914 for years 1 through 5 (inclusive), excluding VAT, retained risks and optimism bias. There is also an ongoing requirement for revenue funding of £995,524 (year 4 only) and £965,074 per annum thereafter, from the inception of the new schools This reflects a reduction in current revenue costs of £73,081 per annum (based on current revenue costs and new, whole year costs from year 5 onwards).

The Band B submission has been scrutinised and assessed by the Council's Section 151 Officer for affordability in light of the 65% programme intervention rate.

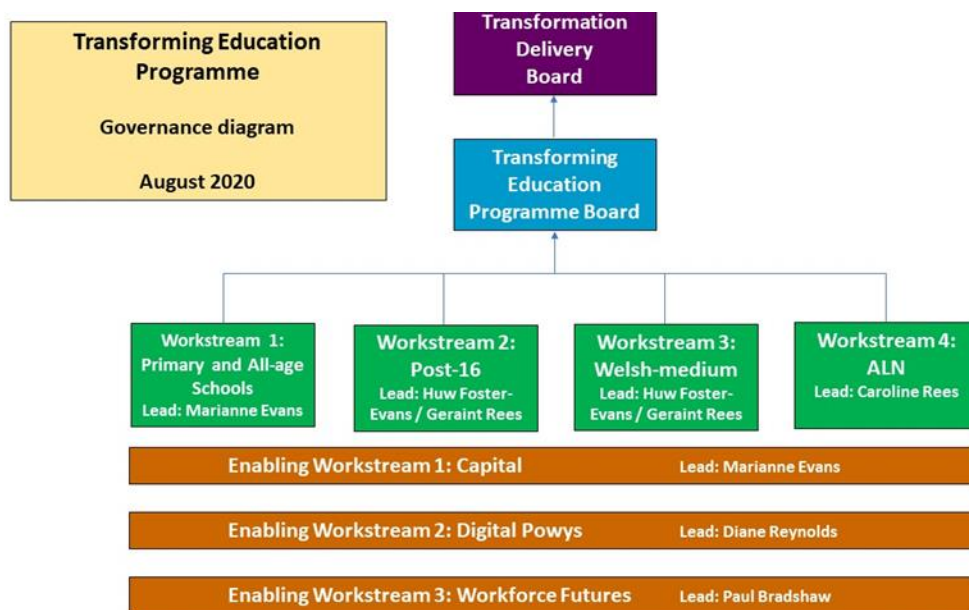
The Council will meet the 35% contribution required to support the overall programme in Band B through a combination of prudential borrowing and a Section 106 agreement.

1.5 Management Case

This scheme is a constituent of Powys County Council's Transforming Education Programme, and has been identified within that Programme as a priority. It will be managed in accordance with best practice in programme and project management principles – MSP and PRINCE2 to provide a systematic and effective delivery framework.

Overall corporate governance for the Transforming Education Programme (formerly known as the 21st Century Schools Transformation Programme) is in accordance with the governance arrangements for the Council's Transformation Programmes.

Governance arrangements for the Transforming Education Programme are set out in the diagram below. The project will report to Enabling Workstream 1: Capital.



The Outline Project Plan is as follows:

Date	Actions (commencement)
04/2022	RIBA Stages 0 -2 completed
10/2022	RIBA Stage 3 (Spatial Coordination) completed
03/2023	Complete RIBA Stage 4 (Technical Design)
04/2023	Tender documentation issued
07/2023	Construction Commences
06/2024	Construction completed
07/2024	School handover
09/2024	New Primary School opens

2 Strategic Case

2.1 Strategic Fit

2.1.1 National Strategies

The proposals contained within this business case contribute to the following national and international strategies and policies:

- United Nations Convention on the Rights of the Child;
- Wellbeing and Future Generations Act 2015;
- The Learning Country: Vision into Action 2008;
- Skills framework for 3-19 year olds in Wales 2008;
- One Wales: One planet, a new sustainable development scheme for Wales May 2009 or any successor strategy;
- Learner Travel Operational Guidance - April 2009;
- A Curriculum for all Learners 2010;
- Measuring the capacity of schools in Wales – Circular 021/2011;
- Welsh Government Welsh Medium Education Strategy 2010;
- Improving Schools National Implementation Plan 2012-15;
- A Living Language: A language for Living: Welsh Language Strategy 2012-17;
- Building a Brighter Future: Early Years and Childcare Plan 2013;
- The Curriculum for Wales
- School Standards and Organisation (Wales) Act 2013;
- School Organisation Code 2018;
- School Organisation: Consultation with Children and Young People – Guidance Document 2013.

2.1.2 Local Strategies

- Vision 2025 sets out the Cabinet's priorities for the council up to 2025. 'Strengthening Learning and Skills' is one of the four priorities outlined within this vision;
- Welsh in Education Strategic Plan 2017-20 sets out the council's priorities for developing Welsh-medium provision within Powys;
- Strategy for Transforming Education in Powys, which sets out Powys' approach to developing the school infrastructure and the planning of school places;
- Powys Community Focused Schools Strategy, which ensures that key services are sufficiently integrated and able to work collaboratively;

- Powys Carbon Reducing & Sustainability Strategies, which identifies that all new schools will be part of a new generation of energy efficient buildings;
- Powys Regenerations Strategy aims to deliver outcomes which will have a positive impact upon the physical, social, environmental, economic and cultural attributes of the county; and
- Powys ICT Strategy which aims at delivering learners’ entitlement to use technology to support their learning and to enable schools to become more innovative and effective in their teaching and learning.

2.2 Case for Change

2.2.1 Investment Objectives

The Investment Objectives underlying the case for change for this project are:

1. To improve transition between key stages.
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21st century.
3. To deliver a 21st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.
5. To achieve a Passivhaus building which is carbon zero.
6. To provide an optimal safeguarding environment.

2.2.2 Targets and measures

The following table identifies the measures and targets that will be utilised to ensure that the identified investment objectives are SMART.

Table 1: Targets & Measures

Investment Objectives	Target	Measure
1. To improve transition between key stages.	<ul style="list-style-type: none"> • Develop effective transition arrangements that ensure the continued progress of pupils throughout their education 	<ul style="list-style-type: none"> • All pupils maintain expected progress relative to their starting points as they transition through each key stage.

Investment Objectives	Target	Measure
<p>2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21st century.</p>	<ul style="list-style-type: none"> • Improve facilities (indoors/outdoors) for all children and staff 	<ul style="list-style-type: none"> • All children will benefit from facilities in the indoors and outdoors that meet the needs of 21st century learners • Teaching and Learning – ‘improved breadth, balance and appropriateness of the curriculum’ (as detailed in Estyn guidance) to be awarded a judgement of at least Good by September 2025 • Achieved through design from opening of new building
<p>3. To deliver a 21st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.</p>	<ul style="list-style-type: none"> • Improved motivation, engagement, attendance & extracurricular involvement as evidenced by: <ul style="list-style-type: none"> • School Self Evaluation • School Improvement Plan • Estyn inspection • Local authority review 	<ul style="list-style-type: none"> • All aspects of pupil wellbeing (as detailed in Estyn guidance) to be awarded a judgement of at least Good by September 2025; • Local Authority core visits report improved engagement, motivation and pupil wellbeing by September 2025; • Attendance percentage rate to increase to 95% for the academic year 2025/2026; • To interview 10% of pupils and 5% of parents to evaluate the effectiveness of the school’s policies and practices in promoting pupils’ wellbeing seeking a 90% satisfaction rate (reference parental survey annexe 5 Estyn guidance).
<p>4. To remove, non DDA compliant condition C and D buildings, reduce backlog</p>	<ul style="list-style-type: none"> • Reduced backlog maintenance and accessibility costs 	<ul style="list-style-type: none"> • Reduction in backlog maintenance and accessibility costs by September 2024

Investment Objectives	Target	Measure
maintenance and provide full accessibility to all pupils, staff and visitors.	<ul style="list-style-type: none"> School is DDA compliant 	<ul style="list-style-type: none"> New school is DDA compliant upon opening in September 2024
5. To achieve a Passivhaus building which is carbon zero.	<ul style="list-style-type: none"> Reduction in energy use and carbon emissions. 	<ul style="list-style-type: none"> Reduction in combined gas and electricity consumption to 124kwh/m2 by September 2024; Reduction in CO2 emission to 19.7kg/m2 by September 2024.
	<ul style="list-style-type: none"> Reduction in surplus places in the new school 	<ul style="list-style-type: none"> To reduce the total number of surplus places by 135 by September 2024
6. To provide an optimal safeguarding environment.	<ul style="list-style-type: none"> Building design meets building bulletin requirements and has appropriately designed safeguarding arrangements. 	<ul style="list-style-type: none"> Achieved through design of new all through school at Ladywell Green/Hafren

2.2.3 Existing Arrangements

Ladywell Green Infants is an English Medium Infants School, providing for age-group 4-7 years and Hafren Junior is an English Medium School, providing for age groups 8-11 years. They share the same site location and their existing school buildings are in a relatively poor state of repair. Both schools are currently under capacity and it is predicted that combined demand will remain roughly at the same levels for the foreseeable future.

Ladywell Green Infants School and Hafren Junior School are amongst the last four infant and junior schools in Powys – the Council has been moving away from this model of education for some years in order to ensure that pupils aged 4 – 11 receive a seamless primary education. On the 3rd March 2020, Cabinet approved the amalgamation of the two schools to create a new primary school which will open in September 2021, and will operate from the existing sites of the two schools. A temporary governing body for the new school has been established to oversee transition to the new operating model.

The condition of the existing school buildings is a cause for concern. Ladywell Green has an assessment of category C/D, and Hafren is classified as category C. A disproportionate amount of time is spent managing the building defects and there is a significant and constant need for repair; for example, both school roofs are in poor condition, each needing fairly urgent replacement, and this contributes to a general sense of their being very energy inefficient buildings. All of which leads to the assets proving costly, in terms of time and finance.

There is also the question of suitability. Whilst both schools are classified as category B, there are question marks about their ability to facilitate delivery of a modern curriculum. The buildings are from the 1960s/1970s and it is felt that the design is not appropriate to meet the needs of a 21st Century curriculum, and to meet the well-being needs of pupils. This is particularly pertinent, because the area is fairly deprived and there are behavioural challenges, which can be exacerbated by the lack of space.

There are also safeguarding issues as a result of the way the existing buildings have been designed and constructed, for example there are no barriers in place. There seems to have been no real site masterplan in place when the schools were originally built. In addition, the access road between the two school buildings is problematic. This makes managing 'parent flow' (i.e. at school start and end times) difficult. This is an issue which would be addressed by having a single school building.

Culturally, the buildings also present some obstacles. Upon merging the two schools, two buildings would not readily bring a one school ethos, for example. It is also desired for a 21st Century fit for purpose building to provide scope for further engagement with the community and, one opportunity for this would be to let space which can be utilised for non-school activities and clubs, helping to generate a more cohesive bond between school and community. It also presents the likelihood of associated income to offset some of the running costs. The existing buildings do not provide the scope to do this.

Overall, the site is not currently living up to its potential. The buildings are not fit for purpose and it is felt that the children deserve better facilities.

Further details on each school is shown below.

Figure 1: School Locations

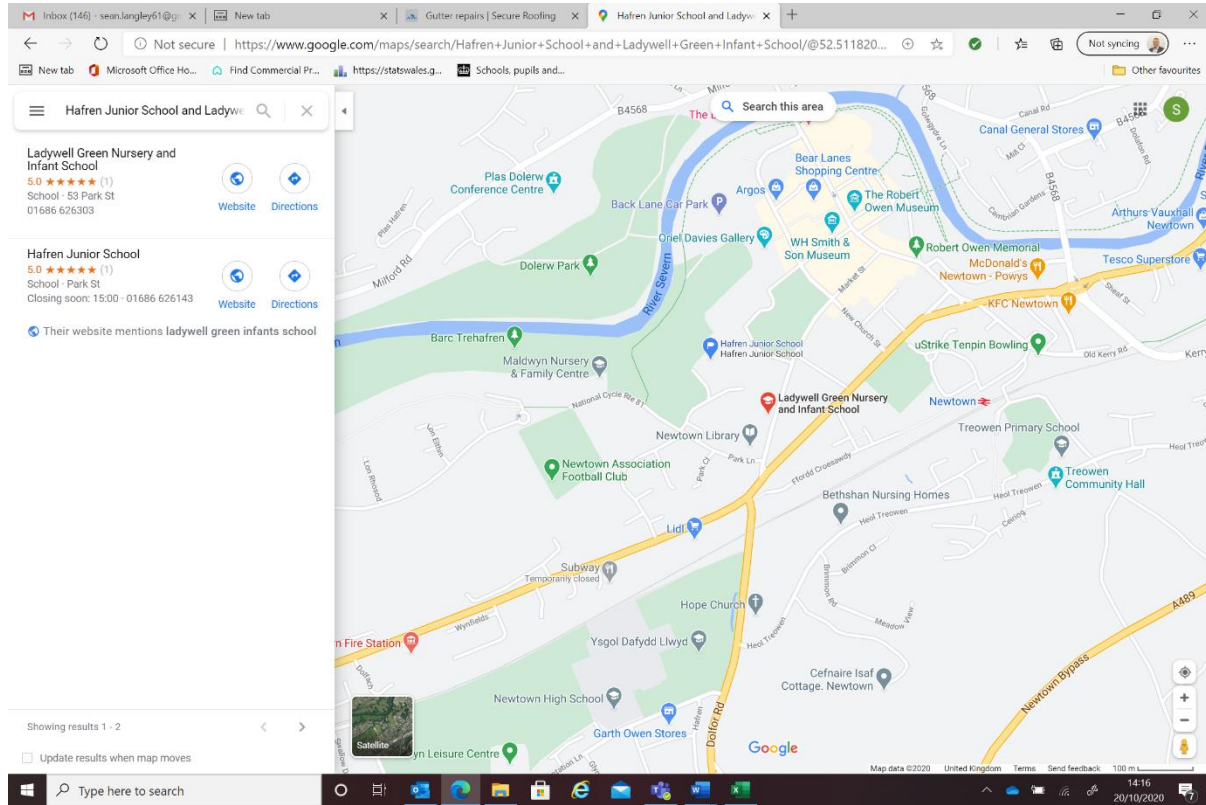


Figure 2: Ladywell Green Infants School



Ladywell Green is an English Medium Infants School and has a relatively significant surplus capacity, with the number of places available at the school higher than the current level of demand. There are a total of 150 school places and 94 current pupils, a utilisation rate of 63%. However, were the school to remain as a separate unit, short-term forecasts for future demand predict that there would be a very small decline in the number of surplus places within the area such that, by 2024, the number of pupils in attendance will be 97 (65% utilisation).

The general condition of the school building is poor, with an assessment of category C/D, although it is assessed as category B for suitability, which potentially makes it advantageous. The school has a budget share higher than the County average, with an outstanding backlog maintenance liability of £1,343,430, which is considered above average for its size. From a strategic infrastructure perspective the clear priority for the Council would normally be to weigh-up whether investment to address the condition of the school and its under-utilisation will be appropriate.

Figure 3: Hafren Junior School



Hafren is an English Medium Junior School and has a relatively significant surplus capacity, which is predicted to worsen, leaving the school running seriously under-capacity. There are a total of 210 school places and only 146 current pupils (c70% full) and, were the school to remain as a separate unit, short-term forecasts for future demand predict that, by 2024, this would deteriorate to c61% utilisation.

The general condition of the school building is relatively poor, with an assessment of category C, although it is assessed as category B for suitability which potentially makes it advantageous. The school has a budget share less than the County average, but an outstanding backlog maintenance liability of £1,560,780, which is considered above average for its size. From a strategic infrastructure perspective the clear priority for the Council would normally be to invest to address the under-utilisation.

Table 2: Summary Information (for combined school)

Language Category	English Medium
Age range	4-11
Total number of places in school	342
Number of pupils	239
Level of surplus places	130 (30.1%)
ALN/SEN Pupils	19.2% (School Action)
Free School Meals	25.1%
Pupils from ethnic minorities	8.8%
Number of Teachers	12.48 FTE
Pupil Teacher Ratio	19.2
National School Categorisation	Hafren: Green Ladywell: Green
GIA	Hafren: 1508.44 Ladywell: 1571.28 Combined: 3079.72

Figures relate to current Hafren and Ladywell Green being treated as a combined school.
Source: PLASC 2020

Table 3: Present & Forecast Pupil Numbers

School	May 2020	Jan 2021	Jan 2022	Jan 2023	Jan 2024
Hafren C.P. School	146	134	135	131	128
Ladywell Green Infants	94	95	91	95	97

Table 4: Latest Condition Assessments

School		Condition	Suitability	Backlog
Hafren C.P. School		C	B	£1,560,780
Ladywell Green Infants School		C/D	B	£1,343,430

2.2.4 Problems with the status quo (summary)

The case for change with the proposed merger of Ladywell Green and Hafren schools is based on a desire to address a number of weaknesses in the existing school arrangements. These issues include the following:

- Both existing school buildings are in a poor state of repair, requiring constant and disproportionate amounts of time to manage defects;
- The buildings are 1960s/1970s and the design is not appropriate to meet the needs of a 21st Century curriculum, and to meet the well-being needs of pupils
- There are safeguarding issues as a result of the way the existing buildings have been designed and built, which makes it difficult to manage 'parent flow';
- Environmental and energy inefficiencies are evident;
- Existing buildings offer very limited scope for extra-curricular activity, thereby weakening community cohesion and no opportunity for creation of additional income.
- The schools are currently housed in separate buildings, which will not support the development of a new identity as one school following merger of the two schools in September 2021

2.2.5 North Powys Well-being Programme

This SOC to develop a new school to replace Ladywell Green Infants School and Hafren Junior School is an integral part of the North Powys Wellbeing Programme (NPWP). The Programme, which was established in 2019, intends to create a collaborative, multi-agency wellbeing campus for the population of north Powys. This is a once in a generation opportunity to bring together partner organisations to enhance and transform the way services are delivered to the local community.

A Programme Business Case (PBC) for the North Powys Wellbeing Programme was approved by the Council's Cabinet in October 2020, and will be considered by the Welsh Government over the coming months.

The PBC demonstrates the ambition across partner organisations to develop a new integrated model for the area, bringing partners together across education, health and social care, housing, community and third sector, with opportunities for further linkages to leisure, police and ambulance services. It will also maximise wellbeing and leisure opportunities via essential links with green spaces through Open Newtown and collaborative working with partners in the Third Sector and local business.

A core aim of the programme is to provide significantly improved and enhanced local services, delivered from a single location in Newtown within sustainable and fit-for-purpose accommodation. This approach will maximise efficiency, integration and innovation across multiple sectors which will represent significant benefits for the local community, including a wider range of services being delivered in county.

The preferred site for the new campus, which would include a new build primary school, is known as the 'Park' area of Newtown. This is the site on which Ladywell Green and Hafren schools are currently located.

Following the development and approval of the PBC, each element within the Programme (education, health & social care, infrastructure) will then develop its own SOC.

It is envisaged that the phasing will be as follows:

- Infrastructure (which will unlock the site for subsequent projects, but specifically for the immediate requirements of the school given the timeline requirements)
- School
- Housing/Community Development/Library (to be confirmed)
- Health and Social Care

However, it will be dependent on the production of the masterplan and ability to fund and decant.

2.3 Welsh Medium Education

Welsh-medium primary education is currently available in Newtown at Ysgol Dafydd Llwyd, which was established in 2001. Following an increase in pupil numbers, the school moved to a new building, funded by the 21st Century Schools Programme, in 2016. The building is currently assessed as having a condition and suitability rating of A and there are no outstanding backlog maintenance liabilities. The school has a current population of 166 and has a total capacity of 210 places.

Secondary provision is available at Caereinion High School, a dual stream high school located 12 miles away.

2.4 Childcare/Nursery Provision

The following Childcare/Nursery provision is currently provided in Newtown:

Non-maintained:

- Ladywell Children's Centre based at Ladywell Infants School
- School Lane Children's Centre based at Penygloddfa CP School
- CM Y Drenewydd based at Ysgol Dafydd Llwyd
- Hope Nursery

- Maldwyn Children & Family Centre
- Little World Nursery

Maintained

- Treowen Tots at Treowen CP School
- Little Stars at Maesyrrhandir CP School

Powys County Council is committed to providing suitable infrastructure to enable providers to provide the 30-hour childcare scheme. Whether or not there is a need to incorporate nursery / early years provision will be a key consideration in respect of any construction project, particularly so where this includes primary provision. As this scheme proceeds, the Council will take a holistic approach based on community needs to determine whether early years provision, including nursery provision, is required as part of the scheme.

A community use strategy is also developed as part of all construction schemes, and consideration will be given in the design stages as to the need for provision such as after school, breakfast and holiday clubs, alongside the wider plans for the Park site as part of the North Powys Well-being Programme.

2.5 Active Travel

It is the council's view that active travel is essential to encourage staff, pupils and wider members of the community to walk and cycle to new facilities, meaning that more people can enjoy the benefits of active travel.

Any construction project taken forward based on this SOC will be developed in line with the Welsh Government Active Travel Wales Act (2013) and design guidance, with the aim of improving active travel links.

Active travel will be considered early on in site selection and feasibility stage, both in respect of the plans for a replacement school for Ladywell Green and Hafren and as part of the wider plans for the Park site as part of the North Powys Well-being Programme

2.6 Community/Sports Facilities

Community/Sports Facilities are provided in Newtown at Maldwyn Leisure Centre. This includes a 25m swimming pool, as well as a gym and sports hall and outdoor facilities.

Ladywell Green and Hafren schools are located on a large site, and benefit from a large amount of green space. This is sometimes used to host community events.

The Council acknowledges the benefits of incorporating community and sports facilities in school construction projects. This is reflected in the Council's Strategy for Transforming Education in Powys, which includes a commitment to 'a major capital investment programme that will ensure that schools in Powys have inspiring, environmentally sustainable buildings

that can provide opportunities for wider community activity, including where possible childcare services, early years, ALN, multi-agency support and community and leisure facilities’.

As the scheme moves forward, the Council will take a holistic approach based on community needs to determine what community facilities are included within each scheme. All developments will be in line with Building Bulletin and Sport Wales guidance.

The plans to develop a replacement school for Ladywell Green and Hafren are part of the North Powys Well-being Programme, which aims to create a collaborative, multi-agency wellbeing campus for the population of north Powys. Community facilities will also be a key consideration as part of the wide plans for the Park site, and any plans to provide Community/Sports Facilities as part of the replacement school will be considered in the context of the wider plans for the site.

2.7 Main Benefits

The main benefits associated with the strategic case are outlined below:

Table 5: Benefits by Investment Objectives

Investment Objectives	Benefit
1. To improve transition between key stages.	<ul style="list-style-type: none"> Improved educational outcomes for pupils between KS1 and KS2 Improved pupil wellbeing (e.g. reduced anxiety) in the move from KS1 to KS2
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21 st century.	<ul style="list-style-type: none"> Full and effective delivery of the Curriculum for Wales. Delivery of the broadest curriculum and the school will be able to attract new teaching staff as a result. Improved pupil satisfaction. Increased number of opportunities for young people to engage with technology.
3. To deliver a 21 st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.	<ul style="list-style-type: none"> Backlog maintenance removed. Improved motivation of students and teachers. Improved pupil satisfaction. Opportunities for teachers to broaden their skill sets. Delivery of the broadest curriculum. Schools will be able to attract new teaching staff as a result of the breadth and depth of curriculum.

	<ul style="list-style-type: none"> • Improved reputation of the school. • Improved educational outcomes. • Increased numbers of learners who transfer into further and higher education. • Reduction in surplus places in the new school.
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.	<ul style="list-style-type: none"> • Backlog maintenance and accessibility costs removed. • School becomes DDA compliant.
5. To achieve a Passivhaus building which is carbon zero.	<ul style="list-style-type: none"> • Reduction in energy use and carbon emissions. • Improved environmental efficiency. • Reduced energy costs and usage.
6. To provide an optimal safeguarding environment.	<ul style="list-style-type: none"> • Reduction in the number of potential safeguarding incidents in the immediate school area; • Better environment (by design) to provide safe space for children in the new school.

2.8 Main Risks

The main risks associated with the strategic case are outlined below.

Table 6: Strategic Risks & Countermeasures

Main Risk	Counter Measures
Business and Political Risks	
1. An unexpected reduction in the level/availability of capital or revenue funding leads to delays and reduction in the scope of the project.	No contractual commitments will be made until firm assurances have been given regarding the affordability and availability of funding.
2. The project requires political endorsement	The Council's Cabinet has given approval in principle to the project and will be kept informed as the project develops.

<p>3. Pupil numbers fall in the short term, making it more difficult to make the case</p>	<p>Detailed (long term) strategic planning about Welsh & English Medium education in the Newtown catchment to underpin the business case.</p>
<p>Service Risks</p>	
<p>1. Legislative changes.</p>	<p>Plan flexibility into the options where possible.</p>
<p>2. WG policy changes</p>	<p>Plan flexibility into the options where possible.</p>
<p>External Environmental Risks</p>	
<p>1. Issues relating to planning permission or planning constraints</p>	<p>Early engagement with the Local Authority Planning Department on the proposed site and to identify any issues relating to planning permission or planning constraints.</p>
<p>2. Covid 19</p>	<p>Early engagement with contractors to establish an appropriate risk response</p>

2.9 Project Constraints

The project is subject to the following constraints:

- Availability of capital funding from Welsh Government and Powys County Council for any new build required;
- Any planning consent which may be required for any new build required;
- Requirement to meet Passivhaus standard;
- Need to minimise negative impact on current pupils.

2.10 Project Dependencies

The project dependencies are as follows:

- Political support at local and national level;
- Stakeholder support – parents, governors, community;
- North Powys Well-being Programme
- Capital funding from Welsh Government and Powys County Council;
- Internal officer capacity;
- Capacity of other service areas to provide support;
- Planning permission and any other statutory consents that may be required.

3 Economic Case

3.1 Critical Success Factors

CSF1: Business Needs

- The option must satisfy all of the 6 Investment Objectives and associated business needs determined for the initiative;
- The option must also optimise compliance with these objectives throughout any phased implementation;
- The option must be the best fit with the demands for skills of the business and commercial communities within the area.

CSF2: Strategic Fit

- The option must fit within and promote National and Regional strategies presented in Business Strategies;
- The option must be the best fit with the strategies of the business and commercial communities within the area;
- The option must fit with the Community Strategies for the area;
- The option must be politically acceptable at local, county and national level.

CSF3: Potential Value for Money (VFM)

- The option must optimise the resources available for the delivery of learning;
- The option must provide value for money in the delivery of learning;
- Operating costs for delivering learning are optimised;
- The option must maximise return on the required investment (benefits optimisation) in terms of economy, efficiency and effectiveness.

CSF4: Benefits Optimisation

- The option must optimise the benefits as presented in the Main Benefits Criteria;
- Achieves an integrated 'one school';
- The option must minimise associated risks.

CSF5: Potential Achievability

- The option must be acceptable to learners, staff, governors and the wider community;
- The option must be achievable within current legislation;
- The options must be operationally achievable/physically achievable;
- There must be the management capacity, skills and vision to deliver the transformation, or must be aware of the need to recruit assistance.

CSF6: Supply side Capacity and Capability

- Sufficient established and reputable construction firms bid for work to ensure both competition and value for money in new building delivery;
- The option must secure sufficient appropriate resources and expertise to be deployed within Powys to achieve the investment objectives.

CSF7: Potential Affordability

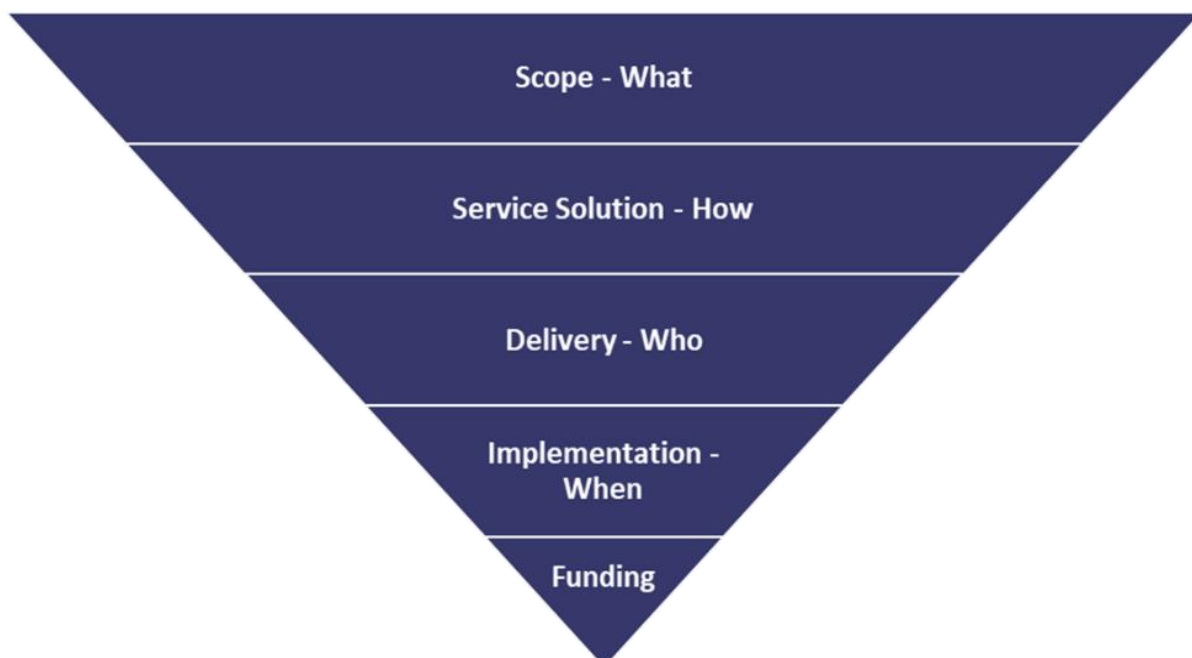
- The extent to which the option is affordable within the forecasted revenue of participating organisations;
- The extent to which the option is affordable within the forecasted capital funding of participating organisations.

3.2 Long List Options

The long list of options was generated by a cross departmental group of stakeholders at a workshop held on Thursday 13th October 2020. The following individuals were present:

- Marianne Evans – Senior Manager Education Services;
- Sarah Astley – Programme Manager;
- Eurig Towns – Senior Challenge Advisor;
- Sharon Hughes – Senior Foundation Phase Advisor
- Nia Vaughan – Challenge Advisor;

The approach to the constituents of the Economic Appraisal is best illustrated as follows:



3.3 Scope Appraisal (the ‘what’)

3.3.1 Options

Minimum Scope:

- Focus on schools of primary school age in the centre of Newtown.

Intermediate Scope:

- Focus on schools of primary school age across the whole of Newtown.

Maximum Scope:

- Focus on schools of primary school age in the full Newtown Catchment area.

For the purposes of this business case, the minimum scope is the preferred scope (i.e. Ladywell and Hafren schools only).

3.3.2 Advantages and Disadvantages

Table 7: Scope Advantages & Disadvantages

Minimum Scope – Schools of Primary age in the Centre of Newtown	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Minimises disruption for pupils, parents and teachers across the catchment • Addresses immediate issues of building condition and the changing relationship of the schools (merger) • Optimises educational provision in the centre of Newtown • Addresses the issue of surplus places; • Addresses the issue of school budgets and financial viability; • Enables a broader curriculum in the centre of Newtown, but not the broader catchment; • No additional transport costs incurred. 	<ul style="list-style-type: none"> • Has limited potential to improve the surplus places position for the whole catchment; • Does not address other schools with significant surplus places and excessive budget share within the catchment.
Intermediate Scope - Schools of primary school age across the whole of Newtown	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Optimises Primary educational provision in the whole of Newtown; • Potentially increases the critical mass of pupils on one site thereby increasing the viability of Newtown Primary schools; 	<ul style="list-style-type: none"> • Does not address the surplus places position for the whole Newtown catchment; • Does not enable a broader more wide-ranging curriculum to be provided for the whole catchment;



<ul style="list-style-type: none"> • Allows for broader curriculum to be delivered in Newtown and surrounding areas; • Addresses the issue of surplus places; • Addresses the issues of building conditions and backlog maintenance within the immediate area; • Addresses the issue of school budgets and financial viability within the wider Newtown area. 	<ul style="list-style-type: none"> • Does not address other schools with significant surplus places and excessive budget share within the catchment. • Potential loss of provision in some communities; • Potential increased transport costs / travel time.
<p>Maximum – Schools of Primary school age in the full Newtown Catchment area</p>	
<p>Advantages</p>	<p>Disadvantages</p>
<ul style="list-style-type: none"> • Optimises Primary educational provision in Newtown; • Provides potential for economies of scale through consolidated arrangements; • Increases the viability of the schools through potential consolidation; • Allows for the broader Primary curriculum to be delivered in the whole of the Newtown catchment; • Addresses the issue of surplus places; • Addresses the issues of Primary school building conditions and backlog maintenance within the immediate area; • Addresses the issue of Primary school budgets and financial viability within the whole Newtown catchment. 	<ul style="list-style-type: none"> • May delay the most urgent (local) opportunities for change; • May miss opportunities for change; • May incur additional transport costs.

3.3.3 Conclusion

Table 8: Scope Appraisal Summary

Reference to:	Min (1)	Int. (2)	Max (3)
Investment Objectives			
1. To improve transition between key stages.	✓	✓	✓
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21 st century.	✓	✓	✓
3. To deliver a 21 st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.	✓	?	?
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.	✓	✓	✓
5. To achieve a Passivhaus building which is carbon zero.	✓	?	✗
6. To provide an optimal safeguarding environment.	✓	✓	✓
Critical Success Factors			
Business Need	✓	?	?
Strategic Fit	✓	✓	✓
Potential VFM	✓	✓	✓
Benefits Realisation	✓	✓	✓
Potential achievability	✓	✗	✗
Supply side capacity & capability	✓	✓	✓
Affordability	✓	?	✗
Summary	Preferred	Discounted	Discounted

The Minimum Scope is the only scope that achieves full compliance with the Investment Objectives and Critical Success Factors.

The Scope option carried forward is therefore the Minimum Scope - Focus on schools of Primary age at the centre of Newtown.

3.4 Service Solution Appraisal (the ‘how’)

3.4.1 Long List of Options (post Scope ‘filter’)

1. Do Nothing (backlog maintenance only) at Ladywell Green Infants and Hafren Junior schools (Minimum).
2. Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school.
3. Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school.
4. Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site.
5. Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school elsewhere in Newtown.
6. Close the current Ladywell infants and Hafren junior School buildings and redistribute pupils to other primary age schools in Newtown.

3.4.2 Advantages and Disadvantages

Table 9: Service Solutions Advantages & Disadvantages

Do Nothing (Minimum)	
Advantages	Disadvantages
<ul style="list-style-type: none"> • No capital spend required immediately; • Enables alternative use of capital funding within the programme envelope; • Does not disrupt existing delivery; • Reduces backlog maintenance liability by £2.9M. 	<ul style="list-style-type: none"> • Will not attract 21st Century Schools funding; • Inadequate school buildings that are in poor condition will continue in use; • Does not align with PCC strategy; • Will not generate any lifecycle efficiencies; • Will not generate any property revenue efficiencies; • No new potential for additional revenue income streams; • Does not address safeguarding and access issues; • Current layouts are inappropriate; • Will not optimise the learning skills measure; • Will result in significant investment required in medium term; • Will not in result in a 21st Century standard school. • Does not release surplus sites for the generation of capital receipts; • Does not provide land for other Partners in the North Powys Programme.

Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Achieves school re-organisation at Ladywell Green Infant and Hafren Junior Schools; • Creates a new Primary School building which enables alignment with PCC education strategy; • Extends the life of the Infants School building; • Less immediate drain on Council's capital resources; • Continuity of Primary education on Infant School site; • Removes backlog maintenance of circa £2.9M; • Likely to enable some energy efficiencies reducing the buildings carbon footprint and ongoing running costs; • Creates financial efficiencies in school staffing structure; • Frees up the Hafren school Site for use by partners in the North Powys Programme. 	<ul style="list-style-type: none"> • Unlikely to generate significant property revenue efficiencies; • No new potential for additional revenue income streams; • Substantial disruption to existing school setting during building work; • Would require temporary relocation of Infants School pupils during building work and associated costs of this; • Does not enhance current public perception of the condition of the school facilities and may be viewed as a stop gap solution.
Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Achieves school re-organisation at Ladywell Green Infant and Hafren Junior Schools; • Creates a new Primary School which enables alignment with PCC education strategy; • Extends the life of the Junior School building; • Less immediate drain on Council's capital resources; • Continuity of education on Junior School site; • Removes backlog maintenance of circa £2.9M; • Likely to enable some energy efficiencies reducing the buildings carbon footprint and ongoing running costs; • Creates financial efficiencies in school staffing structure; • Frees up the Ladywell Green School Site for use by Partners in the North Powys Programme. 	<ul style="list-style-type: none"> • Unlikely to generate significant property revenue efficiencies; • No new potential for additional revenue income streams; • Unlikely to enhance current public perception of the school; • Substantial disruption to existing school setting during building work; • Would require temporary relocation of Junior School pupils during building work and associated costs of this; • Does not enhance current public perception of the condition of the school facilities and may be viewed as a stop gap solution.
Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Achieves school re-organisation at Ladywell Green Infant and Hafren Junior schools; • Enables the educational advantages afforded through continuity of delivery from 	<ul style="list-style-type: none"> • Disruption to existing school setting during building work; • Would require temporary relocation of Infant and Junior School pupils during building work and associated costs of this;

<p>Foundation Stage through to the end of Key Stage 2;</p> <ul style="list-style-type: none"> • Larger school enables economies of scale in procurement for the school governing body; • Provides 21st Century School facilities for Ladywell Green Infant and Hafren Junior School pupils • Creates a new Primary School which enables alignment with PCC education strategy; • Delivers a new build school which extends the time horizon for the requirement for substantial future works into the long term; • Continuity of education on Junior School site; • Removes backlog maintenance of circa £2.9M; • Will enable energy efficiencies reducing the buildings carbon footprint and ongoing running costs; • Creates financial efficiencies in school staffing structure • Frees up the other elements of the site to be used by partners in the North Powys Programme. 	<ul style="list-style-type: none"> • Larger capital investment required.
<p>Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school elsewhere in Newtown</p>	
<p>Advantages</p>	<p>Disadvantages</p>
<ul style="list-style-type: none"> • Achieves school re-organisation at Ladywell Green Infant and Hafren Junior schools; • Enables the educational advantages afforded through continuity of delivery from Foundation Stage through to the end of Key Stage 2; • Larger school enables economies of scale in procurement for the school governing body; • Creates a new Primary School which enables alignment with PCC education strategy; • Provides 21st Century School facilities for Ladywell Green Infants and Hafren Junior School pupils; • Delivers a new build school which extends the time horizon for the requirement for substantial future works into the long term • Minimises disruption during construction as the pupils on both Infant and Junior School sites will be unaffected by the works; • Removes backlog maintenance of circa £2.9M; • Will enable energy efficiencies reducing the buildings carbon footprint and ongoing running costs; • Creates financial efficiencies in school staffing structure; 	<ul style="list-style-type: none"> • Larger capital investment required; • Removes link to North Powys partners (i.e. Health and Children’s services); • Alternative sites are not in PCC control; • Alternative sites are scarce; • There is a purchase cost of any alternative site.



<ul style="list-style-type: none"> Freed up site space opens up possibilities for additional community facilities for partner use as part of the North Powys Programme. 	
<p>Close the current Ladywell infants and Hafren junior School buildings and redistribute pupils to other primary age schools in Newtown</p>	
<p>Advantages</p>	<p>Disadvantages</p>
<ul style="list-style-type: none"> Redistribution of pupils provides financial efficiencies and ensures that other schools become financially viable; Removes backlog maintenance of circa £2.9M; Freed up site space opens up possibilities for additional community facilities for partner use as part of the North Powys Programme. 	<ul style="list-style-type: none"> Lack of continuity in education for current (and future) cohorts of pupils; Disruption to pupils are a key transition point in their academic lives; Dilutes the aims of the North Powys Programme, by removing education from the proposed integrated site (Health and Children’s services); Would be difficult to justify to the Newtown community and, therefore, difficult to achieve.



3.4.3 Conclusion

Table 10: Service Solution Appraisal Summary

Reference to:	1	2	3	4	5	6
Investment Objectives						
1. To improve transition between key stages.	x	✓	✓	✓	✓	x
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21 st century.	x	?	?	✓	✓	x
3. To deliver a 21 st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.	x	?	?	✓	✓	x
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.	x	?	?	✓	✓	?
5. To achieve a Passivhaus building which is carbon zero.	x	?	?	✓	✓	x
6. To provide an optimal safeguarding environment.	x	?	?	✓	✓	?
Critical Success Factors						
Business Need	x	?	?	✓	x	x
Strategic Fit	x	?	?	✓	x	x

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Reference to:	1	2	3	4	5	6
Potential VFM	x	?	?	✓	✓	✓
Benefits Realisation	x	?	?	✓	✓	✓
Potential achievability	x	?	?	✓	?	x
Supply side capacity & capability	✓	✓	✓	✓	?	✓
Affordability	✓	✓	✓	✓	?	✓
Summary	Discount, but c/f as comparator	Possible	Possible	Preferred	Discounted	Discounted



3.4.4 Options carried forward

Four options have been short-listed for economic and financial appraisal:

- Do Nothing (Minimum). Only c/f as a comparator
- Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school.
- Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school.
- Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site

3.5 Service Delivery Appraisal

3.5.1 Options

- Minimum – Local Authority delivery;
- Intermediate – Local Authority and Private Sector partner arrangements;
- Maximum – Private Sector partnership (PPP);

3.5.2 Advantages and Disadvantages

Table 11: Service Delivery Advantages & Disadvantages

Minimum: Local Authority	
Advantages	Disadvantages
<ul style="list-style-type: none"> • All requisite delivery structures are already in place; • Local Authority has extensive experience in delivering this service delivery model; • Cost effective model; • Strategic link to Council's School Transformation Programme; • Most expedient model for delivery; • Politically acceptable; • Limited risk due to specialist support within LA 	<ul style="list-style-type: none"> • May stifle innovation.
Intermediate: Local Authority and Private Sector Partner arrangements	
Advantages	Disadvantages
<ul style="list-style-type: none"> • All requisite delivery structures in place; • Local Authority has extensive experience in delivering this service delivery model; • Cost effective model; • Strategic link to Council's School Transformation Programme; 	<ul style="list-style-type: none"> • Will prove more expensive for the Local Authority; • Contractor may not be au fait with the workings and culture of Local Authority.

<ul style="list-style-type: none"> • Most expedient model for delivery; • Politically acceptable; • Limited risk due to specialist support within LA 	
Maximum: Private Sector partnership (PPP)	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Private sector suppliers will provide specialisms and capacity that the Local Authority alone cannot provide; • Services can be delivered relatively quickly. 	<ul style="list-style-type: none"> • Private contractor is an unknown quantity'; • Contractor may not be au fait with the workings and culture of Local Authority; • Any private sector partnership will be unlikely to include local contractors; • Profit element of partnership may impact on funds available for development.

3.5.3 Conclusion

Table 12: Service Delivery Appraisal Summary

Reference to:	LA	LA & PSP	PPP
Investment Objectives			
1. To improve transition between key stages.	✓	✓	✓
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21 st century.	✓	✓	✓
3. To deliver a 21 st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.	✓	✓	✓
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.	✓	✓	✓
5. To achieve a Passivhaus building which is carbon zero.	✓	✓	✓
6. To provide an optimal safeguarding environment.	✓	✓	✓
Critical Success Factors			
Business Need			
Strategic Fit	x	✓	x
Potential VFM	?	✓	x
Benefits Realisation	✓	✓	✓
Potential achievability	x	✓	✓
Supply side capacity & capability	x	✓	✓
Affordability	x	✓	x
Summary	Discounted	Preferred	Discounted

3.6 Implementation Appraisal

3.6.1 Options

- Minimum – New Schools open September 2025;
- Intermediate – New School opens Spring Term 2025;
- Maximum - New School opens September 2024;

3.6.2 Advantages and Disadvantages

Table 13: Implementation Advantages & Disadvantages

Minimum: New School opens September 2025	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Lack of disruption to education in the short term. 	<ul style="list-style-type: none"> • Delayed to accrual of scheme benefits; • Disconnect with the wider North Powys Transformation Programme. • Current school buildings may need significant investment before 2025.
Intermediate: New School opens Spring Term 2025	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Learners enjoy 21st Century school facilities within a reasonable period of time; • Minimises disruption to learners once school becomes operational; • Allows time for innovation in design but ensures completion within a reasonable time scale; • Minimises local community disruption. 	<ul style="list-style-type: none"> • Partial delay to accrual of scheme benefits; • Partial disconnect with wider North Powys Transformation Programme. • Current school buildings may still need investment before 2025.
Maximum: New School opens September 2024	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Immediate cohorts of learners enjoy 21st Century school facilities within a reasonable period of time; • Minimises disruption to learners once school becomes operational; • Ensures Local Authority funding allocation is spent within Welsh Government timescales; • Ensures completion in a timely manner; • Still time for innovation in design and completion within a reasonable timescale; • Links directly with the North Powys Transformation Programme; • Minimises local community disruption; • Less requirement for investment in the existing schools. 	<ul style="list-style-type: none"> • Requires additional bespoke resource for project in order to deliver upon more demanding timescale.

3.6.3 Conclusion

Table 14: Implementation Appraisal Summary

Reference to:	Sept 25	Spring 25	Sept 24
Investment Objectives			
1. To improve transition between key stages.	✓	✓	✓
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21 st century.	✓	✓	✓
3. To deliver a 21 st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.	✓	✓	✓
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.	✓	✓	✓
5. To achieve a Passivhaus building which is carbon zero.	✓	✓	✓
6. To provide an optimal safeguarding environment.	✓	✓	✓
Critical Success Factors			
Business Need	✗	?	✓
Strategic Fit	✗	✗	✓
Potential VFM	✓	✓	✓
Benefits Realisation	✓	✓	✓
Potential achievability	✓	✓	✓
Supply side capacity & capability	✓	✓	✓
Affordability	?	?	✓
Summary	Discounted	Discounted	Preferred

3.7 Funding Appraisal

3.7.1 Options

- Minimum – Wholly Local Authority funded from capital programme;
- Intermediate – Mix of Local Authority borrowing and Welsh Government funding;
- Maximum – Wholly Welsh Government grant funded.
- Alternative – Mutual Investment Fund (MIM).

3.7.2 Advantages and Disadvantages

Table 15: Funding Advantages & Disadvantages

Minimum: Wholly Local Authority funded from capital programme.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Wouldn't require any additional Local Authority borrowing; • Maximum control over scale and timescale of scheme. 	<ul style="list-style-type: none"> • Diverts capital from other community priorities such as Social Care and highways; • Cost prohibitive; • Affordability.
Intermediate: Mix of Local Authority borrowing and Welsh Government funding.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Ensures affordability of scheme; • Provides certainty to Welsh Government i.e. the scheme fits strategically; • Allows for the direction of capital monies to other community priorities. 	<ul style="list-style-type: none"> • Repayment costs for Local Authority may impact on revenue budgets; • Welsh Government grant funding requirements may be onerous; • Application process may delay delivery.
Maximum: Wholly Welsh Government grant funded.	
Advantages	Disadvantages
<ul style="list-style-type: none"> • Enables major capital investment in other community priorities. 	<ul style="list-style-type: none"> • Welsh Government grant funding requirements may be prohibitive; • Application process may delay delivery. • May stifle innovation.
Alternative: Mutual Investment Model	
Advantages	Disadvantages
<ul style="list-style-type: none"> • No capital funding required up front; • Sponsorship from Welsh Government; • Cost certainty (capital and revenue); • Welsh Governments preferred model. 	<ul style="list-style-type: none"> • Development partners may not be interested; • Complex ownership and governance model; • Multifaceted governance may stifle innovation.

3.7.3 Conclusion

Table 16: Funding Appraisal Summary

Reference to:	WG 100%	Mix	LA 100%	MIM
Investment Objectives				
1. To improve transition between key stages.	✓	✓	✓	✓
2. To provide access to an improved learning environment, including early years provision, plus indoor and outdoor space to deliver a curriculum for the 21 st century.	✓	✓	✓	✓
3. To deliver a 21 st century, fit for purpose, building solution that delivers an improved learning environment and is of an appropriate size.	✓	✓	✓	✓
4. To remove, non DDA compliant condition C and D buildings, reduce backlog maintenance and provide full accessibility to all pupils, staff and visitors.	✓	✓	✓	✓
5. To achieve a Passivhaus building which is carbon zero.	✓	✓	✓	✓
6. To provide an optimal safeguarding environment.	✓	✓	✓	✓
Critical Success Factors				
Business Need	✗	✓	✗	✓
Strategic Fit	✗	✓	✗	✓
Potential VFM	✓	✓	✓	✓
Benefits Realisation	✓	✓	✓	✓
Potential achievability	✗	✓	?	✓
Supply side capacity & capability	?	✓	?	✓
Affordability	✗	✓	✓	✓
Summary	Discounted	Preferred	Discounted	Possible



3.8 Summary of appraisals

Table 17: Long List Summary

Scope appraisal	Minimum – Schools of Primary age in the Centre of Newtown		Intermediate - Schools of primary school age in the wider Newtown area, including suburbs		Maximum – Schools of Primary school age in the full Newtown Catchment area	
Service Solution	Do Nothing (Minimum)	Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school	Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school	Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site	Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school elsewhere in Newtown	Close the current Ladywell infants and Hafren junior School buildings and redistribute pupils to other primary age schools in Newtown
Service Delivery	Minimum: LA Delivery		Intermediate: LA and Private Sector Delivery		Maximum: Private Sector partnership (PPP)	
Implementation	Minimum: New School opens September 2025		Intermediate: New School opens Spring Term 2025		Maximum: New School opens September 2024	
Funding	Minimum: Wholly LA Funded from Capital Programme		Intermediate: Mixed LA & WG Funded		Maximum: Wholly WG Funded Alternative: Mutual Investment Model	

3.9 Economic Appraisal

The following table summarises key results of the economic appraisals for each option. Values used for the economic analysis are expressed in base year terms. Options have been risk-adjusted to account for the 'risk retained' (in £s) by the organisation under each option.

3.9.1 Net Present Cost and Equivalent Annual Cost

The short-listed options were assessed over a 60-year period (30 years in the case of Option 1, Do Nothing), to understand the Net Present Cost (NPC) and Equivalent Annual Cost (EAC) of each option. As the assessment periods were not uniform, the Equivalent Annual Cost is deemed the main point of comparison between the options. The Economic Appraisal resulted in the following outcome:

Table 18: Economic Appraisal Summary

DISCOUNTED CASHFLOW (DCF) SUMMARY SHEET					
Discounted Cash flow (DCF) Summary Sheet		Inc. Optimism Bias		Excl. Optimism Bias	
Option No.	Option Name/Description	NPC (£m)	EAC (£m)	NPC (£m)	EAC (£m)
Option 1:	Do Nothing	23.7	1.25	23.1	1.21
Option 2:	Close the current Hafren junior school building and remodel the current Ladywell infants school building, with a 120 pupil (4 classroom) extension, to make a 270-capacity primary school	38.4	1.46	37.7	1.44
Option 3:	Close the current Ladywell infants school building and remodel the current Hafren junior school building, with a 60 pupil (2 classroom) extension, to make a 270-capacity primary school	39.3	1.50	38.6	1.47
Option 4:	Close the current Ladywell infants and Hafren junior school buildings and build a new 270 capacity primary school on the same site	37.7	1.44	35.8	1.36

DCF = Discounted Cash flow
 NPC = Net Present Cost
 EAC = Equivalent Annual Cost

The economic appraisal shows that Option 1 (Do Nothing) is considered the best option economically, followed closely by Option 4, which has the best Net Present Cost and Equivalent Annual Cost of the other options. Option 1 (Do Nothing) has the best Net Present Cost, but this is because it has been assessed over a shorter period of time. Separately, Option 1 was only carried forward as a comparator, as it failed to meet a significant amount of the scheme Investment Objectives and Critical Success Factors.

Therefore, Option 4 is the preferred option Economically.

3.10 Qualitative Benefits Appraisal

All of the benefits from the SOC were grouped into four categories, and the benefit groups were then weighted by the project team in order to provide an assessment against each of the options.

Table 19: Benefit Group Weighting

Benefit Groups	Example of Benefits (info in brackets = how achieved)	Weight
Standards and Breadth of Education	<ul style="list-style-type: none"> • More pupils with higher qualifications that can provide greater opportunities for future employment, training and education. • More opportunities for teachers' professional and personal development (e.g. through access to a wider range of teaching materials [state of the art ICT and emerging technologies] and accessing and sharing sector leading practice via Professional Learning Communities). • Employers will have young people with a greater range of employability skills. 	10%
Standards of Facilities and Estate	<ul style="list-style-type: none"> • Securing positive learning experiences. • Increased efficiency through school reorganisation and rationalisation. • Facilities which maximise the potential of both teachers and pupils. 	40%
Welfare of Children	<ul style="list-style-type: none"> • Improved safeguarding of children. • Less opportunities for children to be injured/hurt during their school lives. 	30%
Community Integration	<ul style="list-style-type: none"> • Improved links to Health and Children's services. • Improved links with the community. 	20%

Each of the benefit groups were scored on a range of 0-10 for each option. These scores were agreed by the workshop participants to confirm that the scores were fair and reasonable.

Table 20: Benefits Appraisal

Benefit Group	Weight	Maximum Score	Raw				Weighted			
			Option 1	Option 2	Option 3	Option 4	Option 1	Option 2	Option 3	Option 4
Standards of Education	10	10	6	7	7	9	60	70	70	90
Facilities and Estate	40	10	3	6	6	10	120	240	240	400
Welfare of Children	30	10	5	7	7	10	150	210	210	300
Community Integration	20	10	3	5	5	10	60	100	100	200
Total	100		17	25	25	39	390	620	620	990
Rank			4	=2	=2	1	4	=2	=2	1

Option 4 scores best against the quality variables, while Option 1 scores poorly, confirming that the option is not fit for purpose and has only been carried forward for comparison. Options 2 & 3 have identical outcomes, but score particularly badly against the 'Facilities and Estates' and 'Community Integration' variables.

3.11 Summary of Appraisals

Table 21: Summary of Appraisals

Evaluation Results	Option 1	Option 2	Option 3	Option 4
Economic appraisals (EAC)	1	3	4	2
Qualitative Benefits appraisal	4	=2	=2	1
Overall Ranking	=2	=2	4	1

Option 4 ranks as 'best' against the combined Economic and Qualitative Benefit appraisals. In both instances, Options 1 and 2 is rank joint second, leaving Option 3 as the least favourable option overall. Risk has not been appraised at this stage, but a full appraisal will be completed at OBC stage.

Option 4 is therefore the preferred option and subject to Financial appraisal within the Financial case (at Section 5 of this document).

4 Commercial Case

4.1 Procurement Method

4.1.1 Procurement Strategy

Three procurement strategy routes were considered in Powys County Council's 21st Century Schools Strategic Outline Programme Commercial Case. Considerations included the following:

- Public/Private partnerships (including via the Mutual Investment Model);
- Joint venture with the private sector;
- Conventional procurement routes utilising framework contractors.

Consideration of these procurement routes concluded that a Joint Venture with the private sector and the Public/Private Partnerships route were unfeasible in this instance of the following reasons:

- i. There was no commitment to further commercial opportunities of significant scale that could be offered to a separate private entity. This would reduce the commercial appeal of entering into a formal partnership or joint venture with Powys County Council.
- ii. Both Private/Public Partnerships and Joint Ventures are more complex and time consuming to set up and manage. Powys only has limited major construction projects to offer, therefore it is less likely that the fixed costs involved in setting up the partnerships would be recovered through down the line savings or savings achieved through quantities of scale.
- iii. Given the scale of development required within the Council's Band A and B 21st Century Schools Programme, it is felt that the additional costs incurred by the complexities of Public/Private partnerships or a Joint Venture with the private sector will not be justified by the potential benefits from entering into these arrangements.

The Council has good experience of working with contractor frameworks and has achieved positive outcomes using such frameworks. The Council has therefore concluded that the optimum procurement route will be to use the revised SEWSCAP framework that was re-launched in June 2019 (SEWSCAP 3). The benefits of utilising contractors from this existing Contractor Frameworks list are as follows:

1. Consultation and design development can be carried out by the Heart of Wales Property Services Ltd (HoWPS) , which is a 50:50 joint venture partnership between PCC and Kier. The design team will then remain actively involved throughout the duration of the project, fulfilling the intelligent client role once the project is passed over to the successful contractor, thus ensuring continuity of professional staff representing PCC during all stages of the project programme.
2. Compliant with EU procurement directives and the Public Contract Regulations (2014), offering a swift route to market and opportunities for early contractor involvement;

3. The framework is free to use, offering a variety of contracts, pricing models and the potential for further savings achieved via mini-competition;
4. The new SEWSCAP Property Construction Framework is divided into the following lots:
 - Lot 1: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby;
 - Lot 2: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Torfaen County Borough Council, Blaenau Gwent County Borough Council, Monmouthshire County Council, Caerphilly County Borough Council or other Potential Employers based or operating near those areas;
 - Lot 3: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Rhondda Cynon Taf County Borough Council, Merthyr Tydfil County Borough Council and Bridgend County Borough Council and any Participating Authorities based or operating near those areas
 - Lot 4: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£250,000 to £1,500,000) - Vale of Glamorgan Council, The County Council of the City of Cardiff Council, Newport City Council or other Potential Employers based or operating near those areas;
 - Lot 5: Provision of Construction services, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - Powys County Council and other Potential Employers based or operating in Powys or operating nearby to include new build
 - Lot 6: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£1,500,001 to £3,000,000) - All Potential Employers
 - Lot 7: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£3,000,001 to £5,000,000) - All Potential Employers
 - Lot 8: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£5,000,001 to £10,000,000) - All Potential Employers
 - Lot 9: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£10,000,001 to £25,000,000) - All Potential Employers
 - Lot 10: Provision of Construction services to include new build, extensions and refurbishment under traditional or design and build with all associated works – (£25,000,001 to £100,000,000) – All Potential Employers

In this instance the Council propose to use Lot 8 (£5M - £10M). The Core principles of the framework are the over-riding objectives guiding the Authority and the Contractor in the operation of this Framework Agreement, and in entering into and performing Call-Off Contracts. The Authority and the Contractor hereby agree:

- To work together and with the Potential Employers, Employers and their advisers in good faith and in a spirit of mutual trust and co-operation;
- To act in a co-operative and collaborative manner so as to achieve and advance the relevant Construction Project;
- To share information honestly and openly; and
- To highlight any difficulties at the earliest possible opportunity.

The Authority and the Contractor agree to work together in accordance with the terms of this Framework Agreement and in co-operation and collaboration with the Potential Employers, Employers and their advisers, to achieve the successful delivery of a series of Construction Projects and in particular, the Core Principles.

4.1.2 Award methodology

Within this framework two methods may be used by Participating Authorities to award contracts under the framework, as summarised below (Direct award applies to Lots 1-7 and 11 only):

1. Mini-tender – Contractors in the relevant Lots will be invited to tender against a range of quality and pricing criteria. This method will apply to all Lots;
2. Early Contractor Involvement mini-tender - Early Contractor Involvement allows the Employer to engage with a Contractor via a contract to carry out services such as initial design, feasibility and assisting in planning and business cases etc. This process known as a 2-stage design and build requires bidders to submit an overall price for the whole of the works including the design. This will form the basis for the ECI appointment and will be discussed and refined during ECI with the aim of agreeing prices or a contract sum within the price envelope prior to the start of the construction stage.

Under this mini tendering process, the framework contractors will be asked to price scheme specific Preliminaries and Design Costs including an approximate Target Cost as a guide. All other costs would be in accordance with their (already tendered) framework submission. Under NEC3 Option C, the interim valuations will be paid on actual invoiced costs for labour, plant, materials and sub-contractors plus overheads and profit with a gain/pain percentage share on completion.

4.2 Required Services

4.2.1 The required service streams:

A new 3-11 English Medium Primary school (270 capacity).

4.2.2 The specification of required outputs:

- CO2 or energy arising from site activities as deemed required by the contractor to achieve BREEAM Excellent;
- CO2 or energy arising from transport to and from site as deemed required by the contractor to achieve BREEAM Excellent;
- Water consumption arising from site activities as deemed required by the contractor to achieve BREEAM Excellent;
- Air (dust) pollution arising from the site as deemed required by the contractor to achieve BREEAM Excellent;
- Water (ground and surface) pollution occurring on the site as deemed required by the contractor to achieve BREEAM Excellent;
- 80% of site timber is responsibly sourced and 100% is legally sourced.
- The school will be built to Passivhaus standards to reduce energy consumption, and consequently running costs by 80%.

4.3 Potential for Risk Transfer.

Table 22: Risk Category

Risk Category	Potential allocation		
	Public	Private	Shared
Design risk			✓
Construction and development risk		✓	
Transition and implementation risk			✓
Availability and performance risk		✓	
Operating risk	✓		
Variability of revenue risks	✓		
Termination risks		✓	
Technology and obsolescence risks	✓		
Control risks	✓		
Residual value risks	✓		
Financing risks	✓		
Legislative risks			✓

Other project risks			✓
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4.4 Project Bank Accounts (PBAs)

Details around the approach to PBAs will be developed as this proposal moves through the various approval gates. This will include details of:

- Who will approve the PBA documentation and how? For example, who will approve and sign the Deeds of Trust, Deeds of Adherence / Joining Deed, Bank Mandate.
- Who will agree payments due to the lead contractor and each of their named suppliers and how?
- Who will be responsible for paying money into the PBA and authorising payments out?
- Who will agree why certain supply chain members may not be paid directly from the PBA and the criteria this will be based upon?

It is important that the benefits of PBAs are understood, and prospective tenderers understand that they should communicate these benefits down the supply chain, to maximise sub-contractor sign up to the PBA. To support this, a briefing pack and information sheet will be provided to tenderers outlining these benefits and requirements.

4.5 Community Benefits

4.5.1 Agreed schedule

The inclusion of community benefits/social requirements within contracts will ensure that wider social and economic issues are taken into account when tendering construction and development work. The Council particularly considers that the works afford an ideal opportunity to the contractor to enhance employment prospects and skills through the recruitment, training and retention of economically inactive people at a disadvantage in the labour market.

4.5.2 Delivery of agreed targets

Based on previous experience, for a project of this value, we anticipate that the successful contractor would:

- Deliver a Meet the Buyer Event to raise awareness of project to local supply chain;
- Use Sell2Wales to advertise opportunities;
- Complete 100% payments to sub-contractors within 23 days of receipt of invoice;
- Utilise and complete the Value Wales Measurement Tool;
- Provide weeks of employment (to be decided); training and/or work experience opportunities for unemployed people, those leaving and educational establishment or training provider; trainee's or apprentices;
- Employee apprentices on the project (numbers to be decided as the scheme develops);
- Conduct a number of pupil interactions;
- Spend a % of contract spend in Wales;

- Divert a % of waste from landfill; and
- Conduct a number of community initiatives throughout the duration of the project.

5 Financial Case

5.1 Project Summary Costs

Table 23: Key Metrics

Project Title and Location	New build 270 place (3-11) Primary school in Newtown, to replace existing Ladywell Green Infant and Hafren Junior school buildings
New Build % (Area)	1,785 metres squared
Refurbishment % (Area)	Zero
Extension % (Area)	Zero
Description of work & any unusual constraints	No unusual constraints
# Pupil Places	270
# SEN Places	0
Total # Places (whole catchment)	270
Delivered through Regional Framework?	Yes
Contract period in weeks	12 months
Anticipated Community Benefits	Subject to the outcome of procurement
# Trainee and apprenticeship opportunities	Subject to the outcome of procurement
Use of local subcontractors as a % of total cost	Not yet known

5.2 Breakdown of Capital Costs

Table 24: Breakdown of Capital Costs

Project Costs	
Capital Cost	£9,765,626
Optimism Bias (full 24%)	£2,103,750
Risk	£1,051,875
VAT (only to be included where non-recoverable by applicant)	N/A
Total Project Cost (inclusive of optimism bias and risk)	£12,921,251
Total (It is assumed that optimism bias and risk will be fully mitigated and that the £9,765,626 capital build cost is the actual cost upon which the intervention rate will apply).	
Funding Body Contribution	(65%)

5.3 Impact on the Organisation’s income and expenditure account

Table 25: Impact on the Organisation's Income & Expenditure Account

£s	Total Cost	Years (years 8-60 same as year 7, with the exception of Lifecycle costs, which are only shown from year 9, at 5-year periods, and therefore not in the abridged table).								
		0	1	2	3	4	5	6	7	8
		2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
Preferred way forward:										
New Build Capital	£9,765,626		£244,141	£390,625	£6,481,934	£2,404,785	£244,141			
Revenue/Current Cost	£58,227,214	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£995,524	£965,074	£965,074	£965,074	£965,074
Total Cost	£67,992,840	£1,038,155	£1,282,296	£1,428,780	£7,520,089	£3,400,309	£1,209,215	£965,074	£965,074	£965,074
Funded by:										
Existing Revenue	£62,289,300	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155
Total Existing	£62,289,300	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£1,038,155
Additional Funding Req.		£0	£244,141	£390,625	£6,481,934	£2,362,154	£171,060	(£73,081)	(£73,081)	(£73,081)
Cumulative Funding		£0	£244,141	£634,766	£7,116,700	£9,478,854	£9,649,914	£9,576,833	£9,503,752	£9,430,671



5.4 Cost Build Up

Table 26: Cost build up

£s	Total Cost	Years (years 8-60 same as year 7, with exception of Lifecycle costs, occurring at 5-year periods, from year 9)								
		0	1	2	3	4	5	6	7	8
		2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29
CAPITAL COSTS										
New Build Capital Cost	£9,765,626		£244,141	£390,625	£6,481,934	£2,404,785	£244,141			
Capital Costs Total	£9,765,626		£244,141	£390,625	£6,481,934	£2,404,785	£244,141			
REVENUE/CURRENT COSTS										
"Old" Revenue (FF) Cost	£4,152,620	£1,038,155	£1,038,155	£1,038,155	£1,038,155					
"New" Revenue (FF) Cost	£54,074,594					£995,524	£965,074	£965,074	£965,074	£965,074
Lifecycle Cost (see note above)										
Revenue/Current Costs Total	£58,227,214	£1,038,155	£1,038,155	£1,038,155	£1,038,155	£995,524	£965,074	£965,074	£965,074	£965,074
Total Costs	£67,992,840	£1,038,155	£1,282,296	£1,428,780	£7,520,089	£3,400,309	£1,209,215	£965,074	£965,074	£965,074
BENEFITS										
Capital Receipts	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Other Savings	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Benefits Total	£0	£0	£0	£0	£0	£0	£0	£0	£0	£0
Cost Net Cash Savings		£1,038,155	£1,282,296	£1,428,780	£7,520,089	£3,400,309	£1,209,215	£965,074	£965,074	£965,074
Total		£1,038,155	£1,282,296	£1,428,780	£7,520,089	£3,400,309	£1,209,215	£965,074	£965,074	£965,074

5.5 Overall Affordability and Balance Sheet Impact

A balance sheet asset addition of £9,765,626 is made for the new Primary school in Newtown. Short term additional funding is required of £9,649,914 for years 1 through 5 (inclusive), excluding VAT, retained risks and optimism bias. There is also an ongoing requirement for revenue funding of £995,524 (year 4 only) and £965,074 per annum thereafter, from the inception of the new schools This reflects a reduction in current revenue costs of £73,081 per annum (based on current revenue costs and new, whole year costs rom year 5 onwards).

The Band B submission has been scrutinised and assessed by the Council's Section 151 Officer for affordability in light of the 65% programme intervention rate.

The Council will meet the 35% contribution required to support the overall programme in Band B through a combination of prudential borrowing and a Section 106 agreement.

6 Management Case

6.1 Programme Management Arrangements

This scheme is a constituent of Powys County Council’s Transforming Education Programme, and has been identified within that Programme as a priority. It will be managed in accordance with best practice in programme and project management principles – MSP and PRINCE2 to provide a systematic and effective delivery framework.

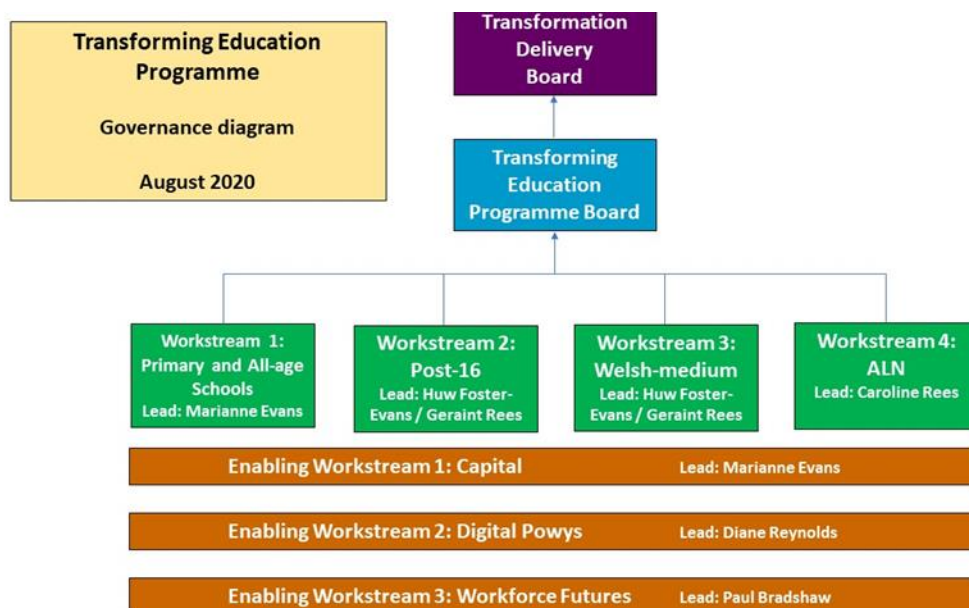
Overall corporate governance for the Transforming Education Programme (formerly known as the 21st Century Schools Transformation Programme) is in accordance with the governance arrangements for the Council’s Transformation Programmes, as outlined in the following diagram:

Figure 4: Corporate Strategy



Governance arrangements for the Transforming Education Programme are set out in the diagram below:

Figure 5: Governance Model



6.1.1 Project Structure

The project will report to Enabling Workstream 1: Capital, as outlined in the diagram above, and will be managed in accordance with the general principles of PRINCE2 methodology.

Outline Project Plan

Table 27: Outline Project Plan

Date	Actions (commencement)
04/2022	RIBA Stages 0 -2 completed
10/2022	RIBA Stage 3 (Spatial Coordination) completed
03/2023	Complete RIBA Stage 4 (Technical Design)
04/2023	Tender documentation issued
07/2023	Construction Commences
06/2024	Construction completed
07/2024	School handover
09/2024	New Primary School opens

6.1.2 Benefits Realisation

The strategy, framework and plan for dealing with the management and delivery of benefits will be developed at OBC stage, but it is understood that benefits that will be realised may be either financial or qualitative (for example improvement in educational standards). A strategy and supporting plan for benefits will clearly show what will happen, where and when the benefits will occur. A full benefit realisation plan will be developed for the preferred option at Full Business Case.

6.2 Risk Management

6.2.1 Risk Workshop

All projects have an element of risk and there must be a proactive approach to risk management to balance risks against the potential rewards and plan to minimise or avoid them. It is also acknowledged that taking some amount of risk will be inevitable to the success of the project. The strategy, framework and plan for dealing with the management of risk for the preferred option follows a PRINCE2 methodology.

The register will be a 'living document' and reviewed and amended (where required) during workshops where a risk manager will be appointed to manage the identification, monitoring, updating, control and mitigation of project risks. The framework and plan of the risk register will involve a rated table format. The risk will be described and the date of its identification noted. An initial risk rating will be made and the probability and impact of the risk evaluated, followed by a residual risk rating column. The effects and impact of risk can involve elements such as environment, time, quality, cost, resource, function or safety and regular meetings will be held to review all aspects. Within the format there will also be the facility for proposals to mitigate and manage, identifying the control strategy, risk owner and the current risk status.

The risks and issues identified within this project will be cross referenced with the risks/issues held by the Programme Board so that cross cutting issues can be mitigated safely.

6.2.2 Risk Identification

Risk identification can occur at all levels of the project, whether from the project teams or the project manager regarding the sub-elements of the project or from the Programme Board (where external risks are identified). Initial risks will be identified through structured workshops attended by the relevant experts and these risks will be captured in a formal project risk register document.

When a risk is identified, the project manager will be responsible for evaluating each risk in terms of the likelihood and impact. The project manager will also enter this information onto the risk register and assign a risk owner who will update the project manager on the status of the risk including the results of mitigating actions.

Risk management will be fundamental to the management of the project and as such, the project risk register will be reviewed on a weekly basis by the project manager. All risks arising from the project teams will be sent to the project manager for evaluation. The total risk score for each risk will be calculated by multiplying the probability score (between 1-4 with 4 being certain) and impact score (between 1-4 with 4 being project failure) and all risks scoring 8 and above will be referred to the Project Board for decision. The risk tolerance line for the project is illustrated in the following table.

Figure 6: Risk Tolerance Profile

Probability	4	4	8	12	16
	3	3	6	9	12
	2	2	4	6	8
	1	1	2	3	4
		1	2	3	4
		Impact			

The risk register will include details of the responsible owner and the required mitigation action for the risk.

6.3 Change and Contract Management

The main aim here is to manage proposed changes to the culture, systems, processes and people working to establish the best option for the council. Change management is not about the provision of the best option but instead focuses on those actions that are necessary to make the best option a working success.

Managers responsible for the key areas will adopt appropriate project management disciplines to meet specific responsibilities. The individual activities may be projects in their own right or be work streams within the overall project.

Planning has been developed for all activities within this change management process through the identification of key outcomes and actions required to ensure successful delivery. Timescales for carrying out such actions, the resources required, and where required, the need for additional resources, have also been determined.

6.4 Gateway Reviews

The Council confirm that it is prepared to complete a Gateway review of the programme at Welsh Government convenience. Further Gateway reviews may then be undertaken during the remaining life of the programme.

6.5 Post Project Evaluation

The outline arrangements for Post Implementation Review (PIR) and Project Evaluation Review (PER) have been established in accordance with best practice and are as follows.

6.5.1 Post Implementation Review (PIR)

These reviews ascertain whether the anticipated benefits have been delivered and are timed to take place a year post construction, i.e. August 2026.

6.5.2 Project Evaluation Reviews (PERs)

PERs appraise how well the project was managed and delivered compared with expectations and are timed to take place one-year post construction, i.e. August 2026.

6.6 Contingency Plans

In the event of project failure, the existing schools will continue to operate until such time that the project can be righted.

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Cyngor Sir Powys County Council

Impact Assessment (IA)

The integrated approach to support effective decision making



Please read the accompanying guidance before completing the form.

This **Impact Assessment (IA)** toolkit, incorporates a range of legislative requirements that support effective decision making and ensure compliance with all relevant legislation. **Draft versions of the assessment should be watermarked as “Draft” and retained for completeness. However, only the final version will be made publicly available. Draft versions may be provided to regulators if appropriate. In line with Council policy IAs should be retained for 7 years.**

Service Area	Schools Service	Head of Service	Lynette Lovell / Emma Palmer	Portfolio Holder	Clr Phyl Davies
Proposal	Newtown Primary (Hafren & Ladywell Green Scool) Strategic Outline Case				
Outline Summary / Description of Proposal					
The Council has developed a Strategic Outline Case (SOC) in respect of the current Ladywell Green Infant School and Hafren Junior School in Newtown. The SOC identified the following preferred way forward:					
<ul style="list-style-type: none"> To build a new 270 place English-medium primary school to replace the current buildings of Hafren Junior School and Ladywell Green Infant School. 					
The Council’s Cabinet will consider the SOC on the 15 th December, and will be asked to approve the following:					
<ul style="list-style-type: none"> To submit the SOC to the Welsh Government’s 21st Century Schools Programme for Investment 					
This impact assessment considers the potential impact on the preferred way forward identified.					

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1. Version Control (services should consider the impact assessment early in the development process and continually evaluate)

Version	Author	Job Title	Date
1	Sarah Astley	Strategic Programme Manager	7 th November 2020

2. Profile of savings delivery (if applicable)

2018-19	2019-20	2020-21	2021-22	2022-23	TOTAL
£	£	£	£	£	£

3. Consultation requirements

Consultation Requirement	Consultation deadline/or justification for no consultation

Cyngor Sir Powys County Council

Impact Assessment (IA)

The integrated approach to support effective decision making



<p>No consultation required (please provide justification)</p>	<p>Consultation in accordance with the School Organisation Code has been undertaken as part of the proposal to amalgamate the schools.</p> <p>No public consultation is required at this stage in order to proceed with the development of a new building, however consultation would be required at the appropriate time as part of the planning process.</p>
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4. Impact on Other Service Areas

Does the proposal have potential to impact on another service area? (Have you considered the implications on Health & Safety and Corporate Parenting?) PLEASE ENSURE YOU INFORM / ENGAGE ANY AFFECTED SERVICE AREAS AT THE EARLIEST OPPORTUNITY			
Adult Services	<input type="checkbox"/>	Education	<input checked="" type="checkbox"/>
Children's Services	<input checked="" type="checkbox"/>	Finance	<input checked="" type="checkbox"/>
Commissioning	<input type="checkbox"/>	Highways, Transportation and Recycling	<input type="checkbox"/>
Digital Services	<input checked="" type="checkbox"/>	Housing and Community Development	<input type="checkbox"/>
		Legal and Democratic Services	<input checked="" type="checkbox"/>
		Property, Planning and Public Protection	<input checked="" type="checkbox"/>
		Transformation and Communications	<input checked="" type="checkbox"/>
		Workforce and OD	<input checked="" type="checkbox"/>
Data Protection Impact Assessment			
<p>Will the proposal involve processing the personal details of individuals? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p> <p>Is Powys County Council the data controller? Yes <input type="checkbox"/> No <input type="checkbox"/> N/A currently <input type="checkbox"/></p> <p>If you have answered yes to either of the above you will be required to complete, as a minimum, the screening questions on the data protection impact assessment. For further advice please contact the Data Compliance Team.</p>			

4a Geographical Locations

What geographical area(s) will be impacted by the proposal? (Chose all those applicable)			
Powys	<input type="checkbox"/>	Brecon	<input type="checkbox"/>
		Builth and Llanwrtyd	<input type="checkbox"/>
North	<input type="checkbox"/>	Crickhowell	<input type="checkbox"/>
Mid	<input type="checkbox"/>	Hay and Talgarth	<input type="checkbox"/>
South	<input type="checkbox"/>	Knighton and Presteigne	<input type="checkbox"/>
		Llandrindod and Rhayader	<input type="checkbox"/>
		Llanfair Caereinion	<input type="checkbox"/>
		Llanfyllin	<input type="checkbox"/>
		Llanidloes	<input type="checkbox"/>
		Machynlleth	<input type="checkbox"/>
		Newtown	<input checked="" type="checkbox"/>
		Welshpool and Montgomery	<input type="checkbox"/>
		Ystradgynlais	<input type="checkbox"/>

Cyngor Sir Powys County Council

Impact Assessment (IA)

The integrated approach to support effective decision making



5. How does your proposal impact on Vision 2025?

Council's Well-being Objective	How does the proposal impact on this Well-being Objective?	IMPACT Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	IMPACT AFTER MITIGATION Please select from drop down box below
The Economy We will develop a vibrant economy	Implementation of the preferred way forward would result in significant capital investment in the area.	Good		Choose an item.
Health and Care We will lead the way in providing effective, integrated health and care in a rural environment	<p>The development of a new school to replace Hafren and Ladywell Green schools is part of the North Powys Wellbeing Programme. The Programme aims to create a collaborative, multi-agency wellbeing campus for the population of North Powys, by bringing together partners across education, health and social care, housing, community and the third sector to develop a new integrated model for the area, in order to improve the health and care available to the population of north Powys.</p> <p>Development of a new school as part of the wider campus also provides opportunities to improve integration between health and care and the school, in order to provide further benefits to pupils and parents.</p>	Very Good		Choose an item.

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Council's Well-being Objective	How does the proposal impact on this Well-being Objective?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
<p>Learning and skills We will strengthen learning and skills</p>	<p>The intention of the SOC is to address the issues identified with the current Ladywell Green and Hafren buildings, thereby improving the quality of provision and educational opportunities provided to pupils.</p> <p>The preferred way forward would provide new facilities to the replace the sub-standard buildings currently occupied by the two schools, which would improve the learning environment for pupils and staff, leading to an improvement in learning and skills.</p> <p>The preferred way forward identified in the SOC is to provide a new primary school building to replace the current separate infant and junior schools, and will follow the merger of the two schools which is due to take place in September 2021. Moving to one new purpose built primary building rather than operating across two separate buildings will enable the school to further improve the provision and opportunities provided to pupils following the establishment of the new school.</p>	<p>Very Good</p>		<p>Choose an item.</p>

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Council's Well-being Objective	How does the proposal impact on this Well-being Objective?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
<p>Residents and Communities We will support our residents and communities</p>	<p>The proposal would have a positive impact on residents in the Newtown area as it would improve the facilities and educational opportunities provided to pupils.</p> <p>The development of a new school to replace Hafren and Ladywell Green schools is part of the North Powys Wellbeing Programme, which aims to create a collaborative, multi-agency wellbeing campus for the population of North Powys. The Programme aims to bring together partners across education, health and social care, housing, community and the third sector to develop a new integrated model for the area, in order to improve the health and care available to the population of north Powys.</p> <p>Integration with the North Powys Well-being Programme provides enhanced opportunities for pupils attending the new school and their parents, through opportunities to include other community facilities and services for families as part of the development. The North Powys Well-being Programme as a whole offers positive benefits for all residents and communities in Newtown and across North Powys, through enhanced services and improved integration between services.</p>	<p>Very Good</p>	<p>.</p>	<p>Neutral</p>

Source of Outline Evidence to support judgements

6. How does your proposal impact on the Welsh Government's well-being goals?

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Well-being Goal	How does proposal contribute to this goal?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
<p>A prosperous Wales: An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.</p>	<p>The preferred way forward would result in a new primary school building in Newtown to replace the current poor quality, inefficient buildings of Ladywell Green and Hafren schools. The intention is that the new building will be BREEAM Excellent and Passivhaus, ensuring the building is as efficient as possible.</p> <p>Community benefits to include opportunities for traineeships / apprenticeships are a key requirement of 21st Century Schools projects, therefore it is anticipated that these opportunities would be available as part of implementing the preferred way forward.</p>	Good		Choose an item.
<p>A resilient Wales: A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).</p>	<p>The intention is that the new building would be a Passivhaus building, which would be significantly more energy efficient than the current buildings.</p>	Good		Choose an item.

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Well-being Goal	How does proposal contribute to this goal?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
<p>A healthier Wales: A society in which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.</p> <p>Public Health (Wales) Act, 2017: Part 6 of the Act requires for public bodies to undertake a health impact assessment to assess the likely effect of a proposed action or decision on the physical or mental health of the people of Wales.</p>	<p>Implementation of the preferred way forward would result in a new school building to replace the current Ladywell Green and Hafren buildings. This would have a positive impact on the well-being and morale of both pupils and staff, and would ensure that all pupils and staff were located in one building, instead of the current separate buildings.</p> <p>The development of a new school building is part of the North Powys Well-being Programme, and the intention is that the new building would be co-located with other services including health and social care, housing, library and the third sector as part of a collaborative, multi-agency wellbeing campus for the population of North Powys. This would enable improved integration between the school and these complementary services, which would have a positive impact on the health and well-being of pupils attending the school and their families, as well as the wider population.</p>	<p>Good</p>		<p>Choose an item.</p>

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Well-being Goal	How does proposal contribute to this goal?	IMPACT Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	IMPACT AFTER MITIGATION Please select from drop down box below
<p>A Wales of cohesive communities: Attractive, viable, safe and well-connected Communities.</p>	<p>Implementation of the preferred way forward would result in one new building to replace the separate buildings currently occupied by Ladywell Green and Hafren schools, ensuring improved cohesion within the new school.</p> <p>The aim that the new building is part of a multi-agency wellbeing campus to be developed by the North Powys Wellbeing Programme provides further opportunities to develop community links.</p>	Good		Choose an item.
<p>A globally responsible Wales: A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.</p> <p>Human Rights - is about being proactive (see guidance)</p> <p>UN Convention on the Rights of the Child: The Convention gives rights to everyone under the age of 18, which include the right to be treated fairly and to be protected from discrimination; that organisations act for the best interest of the child; the right to life, survival and development; and the right to be heard.</p>	<p>The preferred way forward would provide improved, fit for purpose facilities for pupils, and additional opportunities be being part of a multi-agency wellbeing campus, which will become a community hub serving the community of Newtown and beyond.</p> <p>Opportunities will be provided to pupils to contribute to the development of the project as the work moves forward.</p>	Good		Choose an item.
<p>A Wales of vibrant culture and thriving Welsh language: A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation. <i>Incorporating requirements under the Welsh Language (Wales) Measure 2011 and the Welsh Language Standards</i></p>				
<p>Opportunities for persons to use the Welsh language, and treating the Welsh language no less favourable than the English language</p>	No impact	Neutral		Choose an item.
<p>Opportunities to promote the Welsh language</p>	No impact	Neutral		Choose an item.

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Well-being Goal	How does proposal contribute to this goal?	IMPACT Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	IMPACT AFTER MITIGATION Please select from drop down box below
<i>People are encouraged to do sport, art and recreation.</i>	No impact	Neutral		Neutral
A more equal Wales: A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances). <i>Incorporating requirements under the Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011 and the Social Economic duty (2020).</i>				
<i>Age</i>	The proposal would provide improved educational opportunities for pupils attending the school, from early years through to year 6.	Good		Choose an item.
<i>Disability</i>	The new building would be fully DDA compliant, thereby improving the facilities available for any pupils with disabilities. Co-location with other health and care services as part of the North Powys Well-being Programme would also provide benefits to any pupils with disabilities.	Good		Choose an item.
<i>Gender reassignment</i>	No impact.	Neutral		Choose an item.
<i>Marriage or civil partnership</i>	No impact.	Neutral		Choose an item.
<i>Race</i>	The proposal would provide equal opportunities to all pupils attending Ladywell Green and Hafren Schools.	Neutral		Choose an item.
<i>Religion or belief</i>	The proposal would provide equal opportunities to all pupils attending Ladywell Green and Hafren Schools.	Neutral		Choose an item.
<i>Sex</i>	The proposal would provide equal opportunities to all pupils attending Ladywell Green and Hafren Schools.	Neutral		Choose an item.
<i>Sexual Orientation</i>	The proposal would provide equal opportunities to all pupils attending Ladywell Green and Hafren Schools.	Neutral		Choose an item.
<i>Pregnancy and Maternity</i>	No impact.	Neutral		Choose an item.

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Well-being Goal	How does proposal contribute to this goal?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
Socio-economic duty	<p>The aim of the proposal is to provide improved educational opportunities for all pupils currently attending Ladywell Green and Hafren Schools. The project will adopt a Community Benefits Strategy which will give opportunities for local people to achieve accreditations and apprenticeships in construction, helping to reduce inequalities.</p> <p>In addition, being part of a multi-agency wellbeing campus would provide additional opportunities for integration with other organisations supporting pupils and parents, to further benefit pupils and their families, in particular any pupils from low income families.</p>	Good		Choose an item.

Source of Outline Evidence to support judgements

7. How does your proposal impact on the council's other key guiding principles?

Principle	How does the proposal impact on this principle?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
Sustainable Development Principle (5 ways of working)				
<i>Long Term: Looking to the long term so that we do not compromise the ability of future generations to meet their own needs.</i>	The proposal will provide a new building to replace the current poor quality, inefficient buildings currently occupied by Ladywell Green and Hafren schools. The new building will be more efficient, and will ensure that money and time can be better spent on improving the quality of provision rather than on buildings.	Good		Choose an item.
<i>Collaboration: Working with others in a collaborative way to find shared sustainable solutions.</i>	Discussions with the headteacher and representatives of the temporary governing body for the new school have taken place when developing the SOC. The proposal is part of the North Powys Well-being Programme, and collaboration with colleagues across the Council and in Powys teaching Health Board has been a key part of the development of this programme. This will continue as the project moves forward. In addition, opportunities will be provided for key stakeholders associated with the school to be involved in the further development of plans as this work proceeds.	Good		Choose an item.

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Principle	How does the proposal impact on this principle?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
<p><i>Involvement (including Communication and Engagement):</i> <i>Involving a diversity of the population in the decisions that affect them including:</i></p> <p><i>Unpaid Carers:</i> <i>Ensuring that unpaid carers views are sought and taken into account</i></p>	<p>Discussions with the headteacher and representatives of the temporary governing body for the new school have taken place when developing the SOC, and these will continue as the project moves forward, as well as additional opportunities for other stakeholders associated with the school to be involved in the project.</p> <p>The proposal is part of the North Powys Well-being Programme, and collaboration with colleagues across the Council and in Powys teaching Health Board has been a key part of the development of this programme. This will continue as the project moves forward. Opportunities will be provided for stakeholders associated with the school to be involved in the development of plans for the wider site as these move forward.</p>	<p>Good</p>		<p>Choose an item.</p>

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Principle	How does the proposal impact on this principle?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
<p>Prevention: <i>Understanding the root causes of issues to prevent them from occurring including:</i></p> <p>Safeguarding: <i>Preventing and responding to abuse and neglect of children, young people and adults with health and social care needs who can't protect themselves.</i></p>	<p>The challenges relating to the current Ladywell Green and Hafren buildings are identified as part of the SOC. The options appraisal exercise carried out as part of the SOC has focussed on identifying solutions which will address these issues and prevent them occurring again.</p> <p>One of the Investment Objectives identified as part of the SOC process relates to safeguarding, and ensuring appropriate safeguarding arrangements. The intention is that the emerging preferred way forward would address the issues identified and would improve the safeguarding arrangements for all pupils.</p>	<p>Good</p>		<p>Choose an item.</p>
<p>Integration: <i>Taking an integrated approach so that public bodies look at all the well-being goals in deciding on their well-being objectives.</i></p>	<p>The development is part of plans for a community well-being campus in Newtown as part of the North Powys Well-being Programme. Integration with other organisations will be key in order to ensure the success of the campus.</p>	<p>Good</p>		<p>Choose an item.</p>

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Principle	How does the proposal impact on this principle?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
Powys County Council Workforce: What Impact will this change have on the Workforce?	<p>The preferred way forward would impact on staff currently employed at Ladywell Green and Hafren Schools.</p> <p>In the short term, there could be a reduction in staffing requirements following a move from two separate buildings to one building. However, it is likely that the majority of staffing changes will have already been implemented following the merger of the two schools from September 2021.</p> <p>Overall, the impact of this proposal on staff would be positive, as they would be moving to one new building instead of the two separate, poor quality buildings in which they are currently located. This would have a positive impact on staff morale, and would also provide improved opportunities for collaboration between staff from being located in one building.</p>	Good		Choose an item.
Payroll: How will this impact salary, any overtime/enhanced payments etc? Does this affect any particular group of employees? E.g. Male/Female dominated workforce. Does this proposal comply with the Councils Single Status Terms and Conditions?	The proposal complies with Powys CC's Single Status Terms and Conditions. The proposal will have no impact on PCC staff salaries/ enhanced payments.	Neutral		Choose an item.
Welsh Language impact on staff	No impact	Neutral		Choose an item.

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Principle	How does the proposal impact on this principle?	<u>IMPACT</u> Please select from drop down box below	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> Please select from drop down box below
Apprenticeships: Has consideration been given to whether this change impacts negatively, or positively on Apprenticeships within the service?	The project would adopt a Community Benefits Strategy and would set targets in providing apprenticeships, training, and employment opportunities for the local population.	Good		Choose an item.
Source of Outline Evidence to support judgements				
[Empty box for source of outline evidence]				

8. What is the impact of this proposal on our communities?

Communities	How does the proposal impact on residents and community?	<u>IMPACT</u> See impact definitions in guidance document	What will be done to better contribute to a more positive impact or to mitigate any negative impacts?	<u>IMPACT AFTER MITIGATION</u> See impact definitions in guidance document	Source of Outline Evidence to support judgement
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<p>Newtown</p>	<p>The proposal would have a positive impact on residents in the Newtown area as it would improve the facilities and educational opportunities provided to pupils.</p> <p>The development of a new school to replace Hafren and Ladywell Green schools is part of the North Powys Wellbeing Programme, which aims to create a collaborative, multi-agency wellbeing campus for the population of North Powys. The Programme aims to bring together partners across education, health and social care, housing, community and the third sector to develop a new integrated model for the area, in order to improve the health and care available to the population of north Powys.</p> <p>Integration with the North Powys Well-being Programme provides enhanced opportunities for pupils attending the new school and their parents, through opportunities to include other community facilities and services for families as part of the development. The North Powys Well-being Programme as a whole offers positive benefits for all residents and communities in Newtown and across North Powys, through enhanced services and improved integration between services.</p>	<p>Minor</p>	<p>N/A</p>	<p>Choose an item.</p>	
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9. What are the risks to service delivery or the council following implementation of this proposal?

Description of risks			
Risk Identified	Inherent Risk Rating Impact X Likelihood (See Risk Matrix in guidance document)	Mitigation	Residual Risk Rating Impact X Likelihood (See Risk Matrix in guidance document)

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No Capital funding available to fund the project	Medium	SOC to be submitted to Welsh Government in order to secure the funding.	Low
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10. Overall Summary and Judgement of this Impact Assessment?

Outline Assessment (to be inserted in cabinet report)	Cabinet Report Reference:	
<p>This impact assessment suggests that the impact would be positive. The development of a new building to replace the current Ladywell Green and Hafren buildings would address many issues related to the poor condition of the current buildings, ensuring that future pupils would be taught in facilities that are fit-for-purpose, improving their learner entitlement and experience. The new facilities would be fully DDA compliant, supporting learners with disabilities. The development is part of the North Powys Well-being Programme, providing further opportunities for integration between the school and other services, to have a positive impact on the health and well-being of pupils attending the school and their families.</p>		

11. Is there additional evidence to support the Impact Assessment (IA)?

What additional evidence and data has informed the development of your proposal?
N/A

12. On-going monitoring arrangements?

What arrangements will be put in place to monitor the impact over time?
The Transforming Education Programme Board will continue to monitor impact over time.
Please state when this Impact Assessment will be reviewed.
The impact assessment will be reviewed at each RIBA stage as the project moves forward

13. Sign Off

Position	Name	Signature	Date
Impact Assessment Lead:	Sarah Astley	Sarah Astley	7 th November 2020
Head of Service:	Lynette Lovell / Emma Palmer		
Portfolio Holder:	CLlr Phyl Davies		

14. Governance

Decision to be made by	Cabinet	Date required	7 th November 2020
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FORM ENDS

CYNGOR SIR POWYS COUNTY COUNCIL.

CABINET EXECUTIVE

15th December 2020

REPORT AUTHOR: County Councillor Phyl Davies
Portfolio Holder for Education and Property

REPORT TITLE: Welsh-medium Education Strategy

REPORT FOR: Decision

1. Purpose

- 1.1 This report requests Cabinet approval of the new Welsh-medium Education Strategy as set out in Appendix A/B which will form the basis of the Council's new Welsh in Education Strategic Plan (WESP) 2021 – 2031.
- 1.2 The report is supported by the following appendix:
- Appendix A – Welsh-medium Education Strategy (Cymraeg)
 - Appendix B – Welsh-medium Education Strategy (English)

2. Background

Strategy for Transforming Education in Powys

- 2.1 On the 14th April 2020, a new Strategy for Transforming Education in Powys was approved by the Leader via a delegated decision.
- 2.2 The Strategy was developed following extensive engagement with a range of stakeholders during two separate periods between October 2019 and March 2020.
- 2.3 The Strategy sets out a new vision for education in Powys, which is as follows:
- 'All children and young people in Powys will experience a high quality, inspiring education to help develop the knowledge, skills and attributes that will enable them to become healthy, personally fulfilled, economically productive, socially responsible and globally engaged citizens of 21st century Wales.'*
- 2.4 The Strategy also sets out a number of guiding principles which will underpin the transformation of education in Powys. These are as follows:
- *A world class rural education system that has learner entitlement at its core*

- *Schools that are fully inclusive, with a culture of deep collaboration in order to improve learner outcomes and experience*
- *A broad choice and high quality of provision for 14 – 19-year-old learners, that includes both academic and vocational provision, meeting the needs of all learners, communities and the Powys economy*
- *Welsh-medium provision that is accessible and provides a full curriculum in Welsh from Meithrin to age 19 and beyond Provision for learners with Special Educational Needs (SEN)/Additional Learning Needs (ALN) that is accessible as near to home as is practicably possible, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential*
- *A digitally rich schools’ sector that enables all learners and staff to enhance their teaching and learning experience*
- *Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community*
- *Early years provision that is designed to meet the needs of all children, mindful of their particular circumstances, language requirements or any special or additional learning needs*
- *Financially and environmentally sustainable schools*
- *The highest priority is given to staff wellbeing and professional development*

3. Welsh-medium Education Strategy – a vision for increasing the numbers of fully bilingual learners in Powys.

- 3.1 In 2021, the Council will produce a detailed WESP for the next decade. The Strategy attached at Appendix A/B provides a vision to ensure well planned provision for increasing the opportunities for a growing number of children and young people in Powys to become fully bilingual.
- 3.2 The implementation details of how this vision will be achieved will be detailed in the WESP, but will be based on the delivery of the following:

Towards 2030: What needs to be done to increase the opportunities for more young people in Powys to be fully bilingual by 2030.

- *Every family will be clear about the opportunities for bilingual and Welsh language learning that will be available for their young infant well before the time when they make choices about schools. The local authority and its partners will ensure co-ordinated sign-posting of provision for the parents of young children across Powys, and ensure that the option of Welsh medium provision is known to all and provision from early years will be available in each part of Powys. This should include the notion of an “active offer” i.e. when queries are made about admissions to schools or childcare (no matter the background or location of the families), an effort is made*

by all officials to explain the benefits and availability of WM education.

- *There will be early years and primary provision in each of our 13 secondary localities to enable parents to make a realistic choice of a bilingual/Welsh medium provision for their child. Increasingly, there will be more than one provider available in each of the 13 localities. These providers should all seek to align with the work of Mudiad Meithrin and wrap around care support.*
- *There will be a planned programme of immersion available to support families who are new to the area to help their child settle into a bilingual/Welsh medium provision, and a means to support parents and learners already in a Powys school who would like to switch to a bilingual / Welsh-medium provision during the child's primary education or at transition to secondary school.*
- *Dual stream schools will be available where there is no practicable option to have a single-stream school, but in the main the local authority will have developed schools as clearly defined single-stream providers. New bilingual/Welsh-medium provision might be developed through opening a new Bilingual/WM school, facilitating a time-limited dual stream or a 'seedling class*' in order to support their establishment.*
- *Every primary year 5/6 class learning in Welsh will be part of a cohesive transition arrangement to a specified Bilingual/Welsh medium secondary school, with significant collaboration between the secondary and its primary partners to secure effective transition for all learners.*
- *Children with special educational needs will be well supported in Welsh, either in their local Bilingual/Welsh medium school or through effective collaboration with a more specialist setting in Powys.*
- *At secondary school, every learner who is studying in Welsh will be able to access the entire Curriculum for Wales through the medium of Welsh, supported by effective collaboration across the sector to ensure that no Bilingual/Welsh medium setting is too small to offer the whole range of the curriculum in Welsh. In addition to accessing the curriculum in Welsh, the learners should also be able to benefit from a school environment that immerses them in Welsh culture, art, drama, music and where the daily life and business of the school is conducted in Welsh.*
- *At post-16, through collaboration across schools and with other providers, there will be an extensive offer of subjects available in Welsh, in line with other parts of Wales.*

- *The Bilingual/Welsh medium sector across Powys will work as an extended collaboration with the local authority (and with others across Wales) to develop the curriculum offer and entitlement, the support for learners with additional needs, the development and learning of the workforce and the leadership of both schools and the local authority.*
- *The local authority will ensure that centrally managed services offer a more equitable service in both languages to support learners (and staff) in our schools in areas such as youth services, ALN support, leadership development and professional learning.*

4. Resource Implications

- 4.1 It is not possible to identify the resource implications of implementing this Strategy until further detail is available within the WESP.
- 4.2 The Head of Finance (Section 151 Officer) notes the report, the implementation of the strategy will be considered and funded through the Transforming Education in Powys Programme.

5. Legal implications

- 5.1 Legal: The recommendation can be supported from a legal point of view.
- 5.2 The Head of Legal and Democratic Services (Monitoring Officer) has commented as follows: “ I note the legal comment and have nothing to add to the report.”

6. Comment from local member(s)

- 6.1 n/a

7. Integrated Impact Assessment

- 7.1 n/a

8. Recommendation

- 8.1 It is recommended that Cabinet approves the Welsh-medium Education Strategy as the basis for the development of the Council's new Welsh-in Education Strategic Plan.

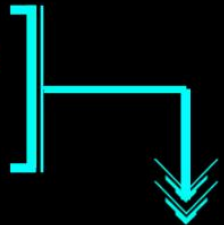
Contact Officer:	Marianne Evans
Tel:	01597 826155
Email:	Marianne.evans@powys.gov.uk

Head of Service: Emma Palmer – Head of Transformation & Communications
Lynette Lovell – Interim Chief Education Officer

Corporate Director: Dr Caroline Turner

CABINET REPORT TEMPLATE VERSION X

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Gweledigaeth ar gyfer cynyddu nifer y
dysgwyr cwbl ddwyieithog ym Mhowys

Rhagfyr 2020



Cynnwys

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Am y ddogfen

Ym mis Mawrth 2020, gosododd yr awdurdod lleol uchelgais clir ar gyfer ei hysgolion, sef:

“Bydd holl blant a phobl ifanc Powys yn derbyn addysg ysbrydoledig o ansawdd uchel i'w helpu i ennill y wybodaeth, sgiliau a'r nodweddion i fod yn bobl iach, economaidd gynhyrchiol sy'n gymdeithasol a bydeang gyfrifol ac yn gallu gwireddu eu dyheadau personol yng Nghymru'r 21ain ganrif”

Dangosodd yr ymgysylltu helaeth gydag ystod eang o randdeiliaid dros y misoedd blaenorol yn hollol eglur, fod angen newid yn gyflym ar gyfer system ysgolion Powys. Yn ategu'r angen am newid, mae'r teimlad eang nad yw'r system ysgolion bellach yn addas ar gyfer cyflwyno trefniadau cynhwysol a modern i gwrdd ag anghenion yr holl ddysgwyr. Roedd yn glir hefyd fod y rhanddeiliaid yn mynnu mai cyfrifoldeb y Cyngor ydyw i fframio a gosod cyfeiriad strategol fel mater o frys, i ymdrin â'r diffygion gafodd eu cydnabod. Maer consensws cryf, a fynegwyd yn gyson yn ystod yr ymgysylltu fod angen ysgolion mwy hygyrch all gefnogi dysgwyr sydd am ddysgu yn Gymraeg – gan gynnig y cwricwlwm llawn o 4 i 18.

Y dystiolaeth o weddill Cymru yw mai addysg cyfrwng Cymraeg/dwyieithog sy'n cynnig y cyfle gorau i ddysgwyr fod yn gwbl ddwyieithog, gan hefyd greu amgylchedd amgylcheddol allblyg a deinamig. Dyma ysgolion sy'n gweithredu yn

Gymraeg, ac sy'n cwrdd ag anghenion dysgwyr o gefndiroedd amrywiol ym mhob rhan o Gymru, yn cynnwys dysgwyr sy'n cyrraedd Cymru ar ôl dechrau eu haddysg. Mae'r ddarpariaeth yn yr ysgolion hyn, fel ysgolion tebyg o amgylch y byd, yn galluogi'r holl ddysgwyr i fod yn bobl ifanc cwbl ddwyieithog.

Yn Ebrill 2020, cafodd y Strategaeth Trawsnewid Addysg ei mabwysiadu ar ran y Cabinet, gan gynnwys yr ymrwymiad canlynol ar gyfer dyfodol addysg yn Gymraeg ar gyfer dysgwyr ym Mhowys.

“Nod Strategol 3: Gwella mynediad at ddarpariaeth cyfrwng Cymraeg ar draws pob cyfnod allweddol”

Diben y nod yw sicrhau y gall nifer gynyddol o blant gael mynediad at addysg cyfrwng Cymraeg yn y dyfodol, o'r blynyddoedd cynnar tan eu hoed gadael ysgol.

O'r dystiolaeth a gasglwyd wrth ymgysylltu, mae'n amlwg nad oes cydraddoldeb o ran y ddarpariaeth i ddysgwyr cyfrwng Cymraeg o amgylch y sir, a bod lefel y ddarpariaeth cyfrwng Cymraeg sydd ar gael fel loteri cod post. Hefyd, nid oes gan ddysgwyr Powys fynediad at ysgol uwchradd cyfrwng Cymraeg.

Bydd **Cynllun Strategol y Gymraeg mewn Addysg 2021-2031** newydd y Cyngor wedi alinio'n llwyr â'r Strategaeth hon, ac yn cynnwys camau gweithredu ychwanegol i gefnogi'r Nod Strategol hon.

Terminoleg

Mae diffyg eglurder wedi bod yn ymwneud ag ystor y derminoleg yn ymwneud â statws iaith ysgolion.

Ledled Cymru, deallir fod **ysgol cyfrwng Cymraeg** yn ysgol lle caiff pob plentyn yn yr ysgol ei ddysgu a'i gefnogi i fod yn gwbl ddwyieithog yn Gymraeg a Saesneg (gan hefyd astudio ieithoedd tramor modern). Wrth iddynt weithio i gynnig cwricwlwm sy'n cefnogi dwyieithrwydd i'r holl ddisgyblion, nid yw'n anghyffredin iddynt gael eu galw'n **ysgolion dwyieithog**.

Ym Mhowys nid oes unrhyw ysgolion uwchradd cyfrwng Cymraeg/dwyieithog yn yr ystyr a nodir uchod h.y. nid oes ysgolion uwchradd sy'n gweithio i sicrhau dwyieithrwydd yr holl ddysgwyr. Mae **ysgolion uwchradd dwy ffrwd** ar draws y sir. Mae'r rhain yn ysgolion lle bydd dim ond cyfran o'u dysgwyr yn cael eu haddysgu mewn modd a fydd yn eu galluogi i fod yn gwbl ddwyieithog erbyn yr adeg y byddant yn gadael yr ysgol. Yn yr ysgolion hyn, mae rhai o'r dysgwyr yn cael eu cwricwlwm yn Saesneg, ac eraill yn cael eu cwricwlwm mewn cymysgedd o Saesneg a Chymraeg. Yn ei hanfod, yn yr un ysgol, mae disgyblion sy'n cael addysg ddwyieithog ac eraill sy'n cael addysg cyfrwng Saesneg. Mae cyfran y dysgwyr mewn ysgolion dwy ffrwd ym Mhowys fel a ganlyn:

Ysgol	Nifer y Disgyblion yn y Ffrwd Gymraeg/ Ddwyieithog	Nifer y Disgyblion yn y Ffrwd Saesneg
Ysgol GG Llanfair-ym-Muallt	108	93
Ysgol yr E. yng Ngh. Rhaeadr	65	136
Ysgol GG Pontsenni	54	82
Ysgol Bro Hyddgen (Cynradd)	112	54
Ysgol Dyffryn Trannon	96	14
Ysgol GG Llanfair Caereinion	86	75
Ysgol Llanfyllin (Cynradd)	67	63
Ysgol Llanrhaeadr-ym-Mochnant	38	36
Ysgol Rhiw Bechan	61	94
Ysgol Trefonnen	88	120
Ysgol Uwchradd Aberhonddu	30	549
Ysgol Uwchradd Caereinion	253	211
Ysgol Uwchradd Llanidloes	106	544
Ysgol Bro Hyddgen (Uwchradd)	186	110
Ysgol Calon Cymru	142	854
Ysgol Llanfyllin (Uwchradd)	158	525

Niferoedd disgyblion ar 13 Hydref 2020

Mae hyn yn wahanol iawn i lawer o Gymru lle mae ysgolion dynodedig sy'n mynd ati i sicrhau fod pob dysgwr yn ddwyieithog, ac eraill yn gweithredu yn Saesneg yn unig. Yng Nghymru, mae 3 awdurdod sydd heb ysgolion cyfrwng Cymraeg/dwyieithog – Powys, Mynwy a Blaenau Gwent. Serch hynny, mae trefniadau cadarn gan Fynwy a Blaenau Gwent ers 30 mlynedd gyda Chasnewydd a Thorfaen i gynnig darpariaeth cyfrwng Gymraeg/ddwyieithog lawn yn eu hysgolion uwchradd.

Mae'r dybiaeth gan rai fod ysgol ddwy ffrwd yr un fath ag ysgol ddwyieithog yn aml wedi bod yn rhwystr i drafodaethau â rhanddeiliaid am gynllunio addysg ar gyfer y dyfodol.

Beth yw'r gwahaniaeth?

Ysgol Cyfrwng Cymraeg neu Ddwyieithog

Dyma ysgolion ble:

Dysgwyr

- Bydd disgwyl i bob dysgwr yn yr ysgol ddod yn gwbl ddwyieithog yn Gymraeg a Saesneg.
- Mae'r holl ddisgyblion yn dysgu Cymraeg a Saesneg i safon mamiaith, yn cynnwys ar gyfer arholiadau allanol, ac hefyd yn dysgu iaith dramor fodern.

Cwricwlwm

- Mae'r cwricwlwm yn cael ei gyflwyno'n bennaf trwy gyfrwng y Gymraeg.

Iaith yr Ysgol

- Mae bywyd gweinyddol a chymdeithasol yr ysgol ar gyfer y disgyblion a staff yn cael ei gynnal yn Gymraeg.

Allgyrsiol

- Mae gweithgareddau allgyrsiol fel rheol yn cael eu cynnal yn Gymraeg, ond bydd myfyrwyr yn cael mynediad ar weithgareddau cenedlaethol yn y ddwy iaith

Ymgysylltu â Rhieni

- Bydd ymgysylltu â rhieni yn digwydd yn gwbl ddwyieithog neu yn ôl dewis y rhieni. Tra bydd y dysgwyr yn gwbl ddwyieithog, efallai na fydd yn rhieni.

Ysgolion Dwy Ffrwd

Dyma ysgolion ble:

Dysgwyr

- Gwneir y gwaith hwnnw i ddatblygu rhai o'r dysgwyr fel dysgwyr dwyieithog tra bydd dysgwyr eraill yn yr ysgol yn astudio yn Saesneg yn unig.
- Bydd dysgwyr yn y ffrwd Gymraeg/ddwyieithog yn astudio'r Gymraeg a'r Saesneg fel mamiaith a disgwylir iddynt fod yn gwbl ddwyieithog, Bydd dysgwyr yn y ffrwd Saesneg yn astudio Saesneg i safon mamiaith a'r Gymraeg fel ail iaith, ac nid yw hyn wedi'i gynllunio iddynt fod yn gwbl ddwyieithog erbyn diwedd eu cyfnod yn yr ysgol.

Cwricwlwm

- Ar y cyfan, mae'r cwricwlwm cyfan ar gael yn Saesneg ar gyfer yr holl ddysgwyr. Mae rhan o'r cwricwlwm ar gael yn Gymraeg i'r rhai yn y ffrwd Gymraeg/ddwyieithog (sy'n amrywio'n fawr o ysgol i ysgol).

Iaith yr Ysgol

- Fel rheol, mae iaith gymdeithasol yr ysgol yn cael ei phennu gan yr arweinyddiaeth a'r staff, a chyfran y dysgwyr sy'n dysgu yn y ddwy iaith.

Allgyrsiol

- Mae gweithgareddau allgyrsiol fel rheol yn cael eu cynnal yn y ddwy iaith.

Ymgysylltu â Rhieni

- Bydd ymgysylltu â rhieni yn digwydd yn gyfan-gwbl yn Gymraeg a/neu Saesneg yn dibynnu ar allu'r staff i gyfathrebu yn Gymraeg neu ôl dewis y rhieni.

Ymgysylltu cyhoeddus diweddar

Yn ystod yr ymarferion ymgysylltu cyhoeddus a gynhaliwyd y llynedd, mynegwyd pryderon am ddarpariaeth bresennol o ran addysg Gymraeg ym Mhowys. Roedd rhai o'r rhain yn cynnwys:

- Nid oes gan yr holl rannau o Bowys ddarpariaeth cyfrwng Cymraeg gynradd nag uwchradd ar gael yn hwylus – ar hyn o bryd nid oes darpariaeth yn ardaloedd Llanandras, Crughywel na Gwernyfed.
- Nid yw nifer o'r ysgolion sydd â dwy ffrwd yn cynnig digon o'u cwricwlwm yn Gymraeg i fodloni eu disgyblion. Mae'r ddarpariaeth yn anghyson, ac anghyfartal mewn gormod o ysgolion uwchradd. Mae'n gyffredin i lai na hanner y cwricwlwm fod ar gael yn newis iaith y dysgwyr yn ffrwd Gymraeg addysg uwchradd o flwyddyn 7.
- Mae'r dewis o bynciau a addysgir trwy gyfrwng y Gymraeg yn mynd yn llai wrth i'r dysgwyr fynd yn hŷn, ac mae darpariaeth ôl-14 yn wael iawn neu ddim yn bodoli. Mae hyn yn cynnwys diffygion yn y ddarpariaeth gan y darparwr Addysg Bellach. Mewn rhai ffrydiau Cymraeg uwchradd, cynigir llai na 5 pwnc TGAU trwy gyfrwng y Gymraeg, ac mewn un achos, dim ond un pwnc sydd ddim yn iaith sy'n cael ei ddysgu yn Gymraeg. Roedd rhai ymatebwyr yn holi sut allen ni gyfeirio at ysgol fel un 'dwy ffrwd' os bydd rhai disgyblion ond yn gallu dewis o un neu ddau bwnc yn Gymraeg.
- Mae tystiolaeth fod rhai rhieni ym Mhowys yn osgoi dewis addysg Gymraeg gan eu bod yn pryderu y bydd y dilyniant ar gael i'w plentyn o fewn yr awdurdod yn gyfyngedig. Mae hyn wedi'i nodi gan benaethiaid cynradd, sy'n teimlo'n rhwystredig yn sgil y diffyg darpariaeth ar ôl i'w disgyblion fynd i addysg uwchradd.
- Ar adeg lle mae addysg ddwyieithog/Gymraeg wedi tyfu ledled Cymru, ac sy'n aml yn sector sy'n cael ei harddangos i wledydd eraill, mae Powys wedi aros yn ei hunfan, ac mewn rhai dangosyddion allweddol, mae'r awdurdod lleol wedi mynd am yn ôl. Mae hyn wedi digwydd er gwaethaf ymrwymadau yng Nghynlluniau Strategol y Gymraeg mewn Addysg Powys mewn blynyddoedd diweddar.
- Mae gan Bowys ganran lai o'i phlant yn dysgu trwy gyfrwng y Gymraeg na chanran y siaradwyr Cymraeg yn y boblogaeth ehangach. Credir mai Powys yw'r unig awdurdod ym Mhowys lle mae hynny'n wir.

Mae'r farn a fynegwyd yn ystod y broses ymgysylltu yn hynod siomedig o ystyried fod Cyngor Sir Powys, yn 2017, wedi cyhoeddi amcanion clir ar gyfer ei Gynllun Strategol y Gymraeg mewn Addysg¹.

Cynllun Strategol y Gymraeg mewn Addysg 2017-20

Yng Nghynllun 2017, roedd y Cyngor yn cydnabod y diffygion yn ei gynlluniau yn y gorffennol ar gyfer addysg cyfrwng Cymraeg, ac yn mynegi'r angen i symud tuag at ysgolion dynodedig Cymraeg yn y cyfnodau cynradd ac uwchradd, ac yn **cynnwys y blaenoriaethau canlynol:**

Amcan 1 - Cynyddu'r cyfleoedd i ddisgyblion fanteisio ar ddarpariaeth blynyddoedd cynnar cyfrwng Cymraeg

¹ [Lawrlwytho Cynllun Strategol y Gymraeg mewn Addysg \(CSGA\) \[226KB\] \(powys.gov.uk\)](#)

Amcan 2 - Sefydlu, a nodi cyfleoedd i sefydlu, darpariaeth cyfrwng Cymraeg ddynodedig newydd yn y sector cynradd

Amcan 3 - Darparu dilyniant ieithyddol tecach a mwy cynaliadwy ar gyfer disgyblion cyfrwng Cymraeg yng Nghyfnodau Allweddol 3, 4 a 5

Amcan 4 - Darparu gwell cyfleoedd i hwyrddyfodiaid drosglwyddo i'r sector cyfrwng Cymraeg ym mhob cyfnod addysg.

Yn 2020, mae'n glir fod yr amcanion hyn yn parhau i fod yn flaenoriaeth ar gyfer yr awdurdod lleol yn sgil methiant cyffredinol i gyflawni'r amcanion hyn dros y ddegawd ddiwethaf. Rhaid gwneud cynnydd nawr ym mhob un o'r meysydd hyn. Roedd cefnogaeth glir i'r cyfeiriad hwn yn yr ymarfer ymgysylltu gyda'r cyhoedd ym misoedd cyntaf 2020, ond mae perygl o golli ffydd yn y Cyngor oni bai ei fod yn gweithredu nawr i ddod â chynigion effeithiol i gyflawni'r amcanion.

Strategaeth Trawsnewid Addysg Powys 2020-2030

Yn Ebrill 2020, defnyddiodd Arweinydd y Cyngor ei grymoedd dirprwyedig i gymell swyddogion i wneud cynnydd gyda chyflwyno ystod eang o gynigion. Dylai'r cynigion hynny adlewyrchu set y cytunwyd arnynt o egwyddorion arweiniol ar gyfer trawsnewid y system ysgolion ym Mhowys.

- ✓ System addysg wledig o safon fyd-eang sy'n rhoi hawliau'r dysgwr wrth ei chalon
- ✓ Ysgolion sy'n gwbl gynhwysol gyda diwylliant o gydweithredu dwfn er mwyn gwella canlyniadau a phrofiadau'r dysgwr
- ✓ Darpariaeth o safon uchel sy'n cynnig dewis eang i ddysgwyr 14-19 oed, gan gynnwys pynciau academaidd a galwedigaethol ac sy'n cwrdd ag anghenion holl ddysgwyr, cymunedau ac economi'r Sir
- ✓ Darpariaeth cyfrwng Cymraeg sy'n hygyrch ac yn cynnig cwricwlwm llawn yn Gymraeg o oed meithrin i rai 19+ oed
- ✓ Darpariaeth i ddysgwyr ag Anghenion Addysgol Arbennig (AAA) / Anghenion Dysgu Ychwanegol (ADY) sydd ar gael mor agos i gartref ag y bo'n ymarferol bosib, gyda'r addysgu, cymorth a chyfleusterau arbenigol priodol i gynorthwyo pob dysgwr i gyflawni eu potensial
- ✓ Sector ysgolion digidol gyfoethog sy'n cynorthwyo'r holl ddysgwyr a staff i wella eu profiadau addysgu a dysgu
- ✓ Ysgolion cymunedol sy'n ganolbwynt ar gyfer gwasanaethau amlasiantaethol i gefnogi plant, pobl ifanc, teuluoedd a'r gymuned
- ✓ Darpariaeth blynnyddoedd cynnar a ddyfeisiwyd i gwrdd ag anghenion bob plentyn, sy'n ystyried eu hamgylchiadau neilltuol, eu gofynion iaith neu unrhyw anghenion dysgu arbennig neu ychwanegol
- ✓ Ysgolion sy'n ariannol ac amgylcheddol gynaliadwy
- ✓ Rhoddir y flaenoriaeth uchaf i les a datblygiad proffesiynol ein staff

Creu dyfodol dwyieithog i Bowys a'i phobl ifanc

Yn ogystal â datblygu'r gweithlu, mae angen i'r awdurdod lleol ganolbwyntio ar dyfu'r cyfleoedd i blant ddysgu yn Gymraeg mewn lleoliadau cyfrwng Cymraeg neu ddwyieithog. Rhaid i hyn gynnwys sicrhau fod staff arbenigol ar gael i allu cefnogi dysgwyr sydd ag anghenion dysgu ychwanegol neu anghenion addysgu arbennig a sicrhau fod ysgolion yn medru cefnogi'r holl ddysgwyr.

1. Mae angen i Bowys normaleiddio addysg cyfrwng Cymraeg/dwyieithog.

Mae plant mewn addysg cyfrwng Cymraeg/dwyieithog yn astudio Cymraeg a Saesneg fel mamiaith, a dyma'r ffordd fwyaf sicr i ddod yn ddwyieithog yng Nghymru. Mae deilliannau iaith a llenyddiaeth Saesneg TGAU a Lefel A yn debyg mewn ysgolion cyfrwng Cymraeg a chyfrwng Saesneg. Mewn geiriau eraill, nid yw disgyblion yn cael canlyniadau salach yn Saesneg os ydynt yn cael eu haddysg yn Gymraeg. Yn yr un modd, nid yw disgyblion yn cael canlyniadau salach mewn mathemateg a gwyddoniaeth os ydynt yn cael eu haddysg mewn ysgolion cyfrwng Cymraeg, yn cynnwys mewn ysgolion lle mae mwyafrif helaeth y plant yn dod o gartrefi di-Gymraeg.

Mae tua 70% o boblogaeth y byd yn ddwyieithog – nid yw'n anghyffredin, ac nid yw'n anghyffredin yng Nghymru, yn enwedig i bobl iau.

Dylai bod yn ddwyieithog fod yn nod realistig ar gyfer mwyafrif y dysgwyr yng Nghymru, oherwydd y manteision o fedru defnyddio mwy nag un iaith yn hyderus. Mae rhai o'r manteision hyn wedi cael eu cyhoeddi'n eang, a gellir eu crynhoi fel a ganlyn:

- Mae dysgwyr sy'n deall mwy nag un iaith yn meddwl yn fwy creadigol a gyda mwy o hyblygrwydd, ac yn tueddu i wneud yn well mewn profion IQ
- Mae bod yn ddwyieithog yn cael effaith gadarnhaol ar yr ymennydd, trwy ei chadw'n actif yn ddiweddarach mewn bywyd
- Gall bod yn ddwyieithog leihau'r risg o ddementia
- Yng Nghymru, mae gallu siarad Cymraeg yn rhugl yn sgil ychwanegol werthfawr, gyda manteision i fusnesau ac i'r unigolyn
- Mae bod yn ddwyieithog yn cynnig mynediad at ddau ddiwylliant gwahanol a dau fyd o brofiadau
- Mae pobl ddwyieithog yn ei chael yn haws i ddysgu trydedd iaith, ac yn aml yn fwy goddefgar tuag at ddiwyllianau eraill.
- Ledled Cymru, mae plant dwyieithog yn tueddu i gael gwell canlyniadau – yn cynnwys yn Saesneg.
- Mae ymchwil yn dangos nad yw bod yn ddwyieithog yn eich dal yn ôl – mewn gwirionedd, mae'r gwrthwyneb yn wir. Mae plant dwyieithog yn gwneud yn well mewn profion rhesymeg Gwyddoniaeth a Mathemateg (Athro Colin Baker, Arbenigwr Rhyngwladol mewn Addysg Ddwyieithog).

Mae gwneud addysg ddwyieithog yn ddarpariaeth normal ac yn hawl naturiol yn hanfodol os ydym am wneud cynnydd yn y maes hwn. I gefnogi normaleiddio dwyieithrwydd, mae awdurdodau ledled Cymru

hefyd wedi nodi ffyrdd lle gall gweithgareddau eraill, fel gwasanaethau ieuencid a gwasanaethau i ddysgwyr gydag ADY/AAA gael eu datblygu.

2. Mae angen i Gyngor Sir Powys a'i bartner ym Mudiad Meithrin gydweithio i sicrhau fod darpariaeth feithrin a blynyddoedd cynnar ar gael i bob plentyn.

Sefydlwyd Mudiad Meithrin ym 1971 ac mae'n gweithredu ledled Cymru (ac ym Mhatagonia) i helpu teuluoedd i roi'r cyfle gorau i'w plant ddod yn naturiol ddwyieithog.

Mae **Cylch Ti a Fi** yn rhoi cyfle i rieni/gofalwyr babanod a phlant ifanc gwrdd unwaith yr wythnos i gymdeithasu, rhannu profiadau am sgiliau magu plant, a chwarae gyda'i gilydd mewn awyrgylch anffurfiol Cymraeg. Yn y grwpiau Cylch Ti a Fi gallwch fwynhau gwneud ffrindiau newydd, chwarae â theganau, dysgu canu rhigymau Cymraeg syml, a gwrando ar straeon Cymraeg gyda'ch plentyn. Rydych yn gallu mynd â'ch plentyn i Gylch Ti a Fi pan mae tua chwe mis oed.

Cylch chwarae cyfrwng Cymraeg yw'r **Cylch Meithrin** sy'n cynnig cyfle i'ch plentyn gymdeithasu gyda phlant eraill a dysgu trwy chwarae dan gyfarwyddyd staff proffesiynol a chymwys. Trwy fynychu'r Cylch Meithrin bydd eich plentyn yn dechrau ar ei daith/ei thaith i addysg cyfrwng Cymraeg. Bydd yn datblygu'n unigolyn hyderus a fydd yn barod i gymryd y cam nesaf tuag at addysg cyfrwng Cymraeg yn eich ysgol leol. Mae plant yn dechrau mewn Cylch Meithrin (sef Ysgol Feithrin Gymraeg) pan maent yn ddwyflwydd a hanner.

Wrth iddo gyflwyno'i raglen drawsnewid bydd angen i'r awdurdod lleol ystyried cyfleoedd i ddatblygu cyfleusterau y gall y Mudiad Meithrin a phartneriaid eraill eu defnyddio. Bydd hwn yn gallu cyfoethogi'r cynnig ar gyfer rhieni plant ifanc a dylai cynnwys dadansoddi gofalus o'r gofal cofleidiol sydd ar gael i deuluoedd. O ganlyniad, bydd y ddarpariaeth yn Gymraeg yn cyd-fynd â darpariaeth y Cylch Meithrin a'r ysgol gynradd.

3. Mae angen i Bowys groesawu newydd-ddyfodiaid i'r ardal, gyda llawer yn newydd i Gymru. Dylem hefyd groesawu'r rhai sydd am ddewis addysg cyfrwng Cymraeg ar ôl dewis addysg cyfrwng Saesneg yn wreiddiol i'w plentyn. Gallwn wneud hyn trwy gynnig cyfleoedd trochi (dysgu iaith yn gyflym) a chyfle i ymuno ac integreiddio'n llwyr i ddosbarth cyfrwng Cymraeg/dwyieithog.

Ni ddylai'r un plentyn gael ei eithrio rhag y cyfle i gael addysg trwy gyfrwng y Gymraeg - hyd yn oed os ydynt yn cyrraedd Cymru peth o'r ffordd trwy eu haddysg. Mae Cyngor Sir Powys wrthi'n sefydlu Canolfannau Iaith Cymraeg a fydd yn cynnig cyrsiau dwys i bobl sy'n symud i'r ardal, neu ddisgyblion sy'n mynychu addysg cyfrwng Saesneg ar hyn o bryd a fyddai'n hoffi trosglwyddo i addysg Gymraeg. Mae canolfannau iaith Cymraeg wedi'u sefydlu ar draws Cymru fel dull effeithiol a llwyddiannus o drochi plant yn yr iaith Gymraeg a'u galluogi i drosglwyddo'n effeithiol i addysg cyfrwng Cymraeg. Gyda meddylfryd cadarnhaol ac addysgu effeithiol mae plant yn caffael ieithoedd yn hawdd iawn. Mae hwn yn gweithio

ledled y byd ac mewn rhannau eraill o Gymru a bydd yn cael ei gyflwyno mewn mannau gwahanol o Bowys yn y dyfodol agos.

4. Mae angen i Bowys gael rhwydwaith o ddarparwyr cynradd cyfrwng Cymraeg/dwyieithog ym mhob ardal yn y sir.

Mae addysg Gymraeg/ddwyieithog i bawb ledled Cymru, nid dim ond i blant o deuluoedd sy'n siarad Cymraeg yn barod neu unrhyw grŵp cymdeithasol neu ethnig. Cafodd naws byd-eang i Eisteddfod Genedlaethol COVID ar-lein ei chyfoethogi'n aruthrol gan bobl ifanc o gefndiroedd ethnig Affro-Caribiaidd, Asiaidd ac Arabaidd. Roedd y plant hyn wedi cael eu haddysgu yn Gymraeg a bellach maent yn gwneud cyfraniad sylweddol i bresennol a dyfodol Cymru. Mae hyn yn gofyn am newid agwedd meddwl ym Mhowys fel bod yr iaith Gymraeg yn perthyn i bob un o'n pobl ifanc, trwy system addysg fyrlymus sy'n anelu at greu siaradwyr rhugl ar draws yr awdurdod. Ar hyn o bryd nid oes gan rai ardaloedd ddarpariaeth ar gyfer addysg gynradd Gymraeg/ddwyieithog, e.e. ardaloedd Crughywel, Y Gelli Gandryll/Talgarth a Llanandras.

Mae rhai ysgolion yn awyddus yn barod i symud ar hyd y continwmm iaith. Golyga hyn er mai dim ond canran penodedig o'u dysgwyr sy'n defnyddio'r Gymraeg yn rhugl bob dydd, maent am weithio i'r graddau nes bod mwy, neu bob un o'u dysgwyr yn gadael yr ysgol yn gwbl ddwyieithog neu'n amlieithog. Mae angen rhoi'r amser a'r cymorth i ysgolion iddynt fedru gwireddu hyn. Ar yr un pryd dylai'r awdurdod lleol geisio sicrhau bod darpariaeth lawn yn y Gymraeg ar gael o fewn pellter teithio rhesymol i bob plentyn a pherson ifanc ym Mhowys.

Gellid mynd i'r afael â hyn yn y tymor canolig i'r tymor byr trwy amrywiaeth o ddewisiadau, e.e. trwy ddatblygu cyfleusterau dwy ffrwd lle nad oes rhai ar hyn o bryd. Mewn achosion eraill gellid cefnogi ysgolion i symud o fod yn sefydliadau dwy ffrwd i ysgolion sy'n anelu at ddwyieithrwydd llawn i bob un o'u dysgwyr. Gan hynny byddent yn dod yn ysgolion cyfrwng Cymraeg neu ddwyieithog. Gallai dewisiadau eraill gynnwys symud y cyfnod sylfaen i gynnig yn Gymraeg a yna'n galluogi i bob dysgwr dyfu trwy'r ysgol gyda disgygliad o ddwyieithrwydd llawn i bawb.

5. Mae angen i Bowys ddatblygu rhwydwaith o ddarparwyr uwchradd sy'n cefnogi ei gilydd sy'n medru cynnig cwricwlwm llawn ar draws Powys yn Gymraeg ym mhob cyfnod allweddol.

Yn syml, nid yw'r model presennol o chwe ysgol uwchradd ddwy ffrwd yn gweithio'n ddigon da i gynnig y ddarpariaeth addysgol lawn yn Gymraeg i'n pobl ifanc. Nid yw'n creu'r nifer o ddysgwyr dwyieithog y dylai Powys fod yn ei gyfrannu at ddyfodol ein cymdeithas a'n heconomi, gyda'r holl gyfleoedd y gall hynny eu cynnig i'n pobl ifanc. Gan mwyaf, nifer bach o ddisgyblion sy'n dysgu Cymraeg yn yr ysgolion hynny, ac nid yw'r ddarpariaeth gwricwlwm ar eu cyfer yn gyflawn. Mae niferoedd y ddisgyblion uwchradd o Bowys sy'n cymryd rhan mewn digwyddiadau cenedlaethol Cymraeg ar gyfer ysgolion yn wael. Rhaid mynd i'r afael â'r cyfleoedd ar gyfer cyfranogi'n effeithiol o'r cwricwlwm ffurfiol ac anffurfiol. Fel arfer mae'r cyfleoedd i ddathlu celfyddyd, cerddoriaeth, a drama Cymraeg a llawer mwy yn cael eu colli. Prin yw'r ysgolion sy'n ymddangos yn genedlaethol ymysg yr ystod o ysgolion cyfrwng Cymraeg/dwyieithog sy'n bodoli ledled Cymru.

Mae darpariaeth cyfrwng Cymraeg/dwyieithog yn arferol ar draws Cymru. Mewn ardaloedd a oedd wedi dod yn Saesneg eu hiaith yn bennaf yn ystod yr ugeinfed ganrif ceir ysgolion uwchradd cyfrwng Cymraeg llewyrchus. Mae'r rhain i'w gweld yn Nhorfaen, Casnewydd, De Sir Benfro, Wrecsam a Sir y Fflint. Nid oes gan Bowys ysgol uwchradd cyfrwng Cymraeg dynodedig ar hyn o bryd. Roedd yr adborth a gafwyd yn ein hymarfer ymgysylltu 2019/20 yn awgrymu'n glir bod hwn yn cyfyngu ar dwf y sector cynradd ym Mhowys.

Dylid rhoi cynllun clir yn ei le i sicrhau bod gan ein pobl ifanc yr un cyfleoedd â phobl ifanc yng ngweddill Cymru i ddilyn eu haddysg yn Gymraeg hyd at ddiwedd yr ysgol uwchradd. Bydd hyn yn sicrhau y byddant yn gwbl ddwyieithog ac y gallant chwarae rhan lawn ym mhob agwedd ar fywyd yng Nghymru a thu hwnt.

Dylai'r rhaglen drawsnewid geisio sicrhau bod darpariaeth cyfrwng Cymraeg/dwyieithog ar gael mewn ysgolion cynradd ac uwchradd ym mhob cwr o Bowys.

Dyfodol darpariaeth ym Mhowys

Y dystiolaeth o weddill Cymru yw bod darpariaeth ddwyieithog/cyfrwng Cymraeg yn cynnig y cyfle gorau i ddysgwyr ddod yn gwbl ddwyieithog wrth greu amgylchedd diwylliannol blaengar sy'n edrych tuag allan. Yn dilyn y penderfyniad a wnaed i sicrhau bod Powys wedi'i ymrwymo i ddatblygu ysgolion bob oed mewn lleoliadau allweddol ar draws y sir mae'n hanfodol ymchwilio i sut y gellir sicrhau bod darpariaeth ddwyieithog/cyfrwng Cymraeg ar gael i ddisgyblion cyn-ysgol ac oedran ysgol gynradd ar draws pob lleoliad. Wedyn mae angen cynnig dilyniant sicr o fewn pellter rhesymol trwy ystod llawn addysg uwchradd a thu hwnt.

Tuag at 2030: Beth sydd angen ei wneud i gynyddu cyfleoedd i ragor o bobl ifanc ym Mhowys fod yn gwbl ddwyieithog erbyn 2030.

1. Bydd pob teulu'n glir eu meddwl am y cyfleoedd ar gyfer dysgu'r Gymraeg a dysgu dwyieithog a fydd ar gael i'w plentyn bach ymhell cyn yr amser y byddant yn gwneud penderfyniadau am ysgolion. Bydd yr awdurdod lleol a'i bartneriaid yn sicrhau y byddant yn cyfeirio rhieni plant ifanc at y ddarpariaeth mewn modd cydlynus. Bydd yr awdurdod yn sicrhau bod y dewis o ddarpariaeth cyfrwng Cymraeg yn hysbys i bawb a bydd darpariaeth o'r blynyddoedd cynnar ar gael ym mhob rhan o Bowys. Dylai hyn gynnwys y syniad o "gynnig gweithredol" sy'n golygu pan fydd rhieni'n holi ynghylch derbyniadau i ysgolion neu ofal plant (ni waeth be fo cefndir y teulu neu le y maent yn byw) bydd swyddogion yn gwneud ymdrech i egluro buddion addysg cyfrwng Cymraeg a lle y mae ar gael.
2. Bydd darpariaeth y blynyddoedd cynnar a chynradd ym mhob un o'n 13 lleoliad uwchradd i alluogi rhieni i wneud dewis realistig am ddarpariaeth ddwyieithog/cyfrwng Cymraeg ar gyfer eu plentyn. Yn fwyfwy bydd mwy nag un darparwr ar gael ym mhob un o'r 13 lleoliad. Dylai'r darparwyr hyn sicrhau bod eu cynnig yn cyd-fynd â gwaith Mudiad Meithrin a chefnogaeth gofal cofleidiol.
3. Bydd cynllun bwriadol o drochi ar gael i gefnogi teuluoedd sy'n newydd i'r ardal i helpu eu plentyn i ymgynefino â darpariaeth ddwyieithog/cyfrwng Cymraeg. Hefyd bydd modd cefnogi rhieni a dysgwyr sydd mewn ysgol ym Mhowys yn barod ond sy'n dymuno newid i ddarpariaeth ddwyieithog/cyfrwng Cymraeg yn ystod addysg gynradd y plentyn, neu wrth iddynt drosglwyddo i'r ysgol uwchradd.
4. Bydd ysgolion dwy ffrwd ar gael lle nad oes dewis ymarferol i gael ysgol un ffrwd, ond ar y cyfan bydd yr awdurdod lleol wedi datblygu ysgolion fel darparwyr un ffrwd diamwys. Gellid datblygu darpariaeth ddwyieithog/cyfrwng Cymraeg newydd trwy agor ysgol ddwyieithog/cyfrwng Cymraeg newydd, a fydd yn hwyluso dwy ffrwd am amser cyfyngedig, neu egin ddosbarth² i gefnogi sefydlu'r

² Defnyddiwyd y rhain yn llwyddiannus mewn mannau eraill o Gymru. Mae egin ddosbarth yn bodoli pan mae ysgol cyfrwng Saesneg gyda lle dros ben yn cynnig rhai o'i hystafelloedd ar gyfer agor darpariaeth cyfrwng Cymraeg newydd. Mae'n dechrau gyda disgyblion o'r oedran ieuangaf i fyny. Fel arfer bydd athro'n gyfrifol am y ddarpariaeth cyfrwng Cymraeg honno ar y safle, a bydd yn cael ei chefnogi gan ysgol cyfrwng Cymraeg cyfagos, gan gynnwys ei phennaeth. Pan sefydlir yr egin ddosbarth, fe ddaw un ai yn ysgol ynnddi ei hun ar ei safle presennol, neu bydd yn symud i safle dynodedig pwrpasol.

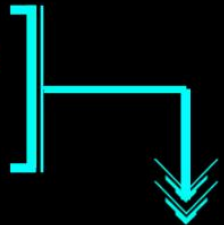
ddarpariaeth.

5. Bydd pob dosbarth cynradd blwyddyn 5/6 sy'n dysgu yn Gymraeg yn rhan o drefniant pontio cydlynol i ysgol uwchradd ddwyieithog/cyfrwng Gymraeg penodedig. Bydd cydweithredu sylweddol rhwng yr ysgol uwchradd a'i phartneriaid cynradd i sicrhau pontio effeithiol ar gyfer pob dysgwr.
6. Bydd plant gydag anghenion addysgol arbennig yn cael eu cefnogi'n dda yn y Gymraeg, un ai yn eu hysgol ddwyieithog/cyfrwng Gymraeg leol neu drwy gydweithredu effeithiol â lleoliad mwy arbenigol ym Mhowys.
7. Yn yr ysgol uwchradd, bydd pob dysgwr sy'n astudio Gymraeg yn gallu cael mynediad at Gwricwlwm i Gymru cyfan trwy gyfrwng y Gymraeg, trwy gael eu cefnogi gan gydweithredu effeithiol ar draws y sector. Bydd hyn yn sicrhau nad yw'r un lleoliad dwyieithog/cyfrwng Gymraeg yn rhy fach i gynnig holl ystod y cwricwlwm yn Gymraeg. Ar ben dysgu'r cwricwlwm yn Gymraeg dylai'r dysgwyr hefyd medru elwa ar amgylchedd ysgol sy'n eu trochi mewn diwylliant, celfyddyd, drama a cherddoriaeth Gymraeg, lle mae bywyd a gwaith beunyddiol yr ysgol yn digwydd yn Gymraeg.
8. Ar lefel Ôl-16, trwy gydweithredu ar draws ysgolion a chyda darparwyr eraill, bydd cynnig eang o bynciau ar gael yn Gymraeg, yn unol â rhannau eraill o Gymru.
9. Bydd y sector dwyieithog/cyfrwng Gymraeg ar draws Powys yn gweithio fel cydweithrediad estynedig gyda'r awdurdod lleol (a chydag eraill ledled Cymru) i ddatblygu'r cynnig a'r hawl cwricwlwm, y gefnogaeth i ddysgwyr gydag anghenion ychwanegol, datblygiad a dysgu'r gweithlu, ac arweinyddiaeth yr ysgolion a'r awdurdod lleol.
10. Bydd yr awdurdod lleol yn sicrhau bod gwasanaethau a reolir yn ganolog yn cynnig gwasanaeth tecach yn y ddwy iaith i gefnogi dysgwyr (a staff) yn ein hysgolion. Bydd hyn mewn meysydd megis gwasanaethau ieuencid, cefnogi Anghenion Dysgu Ychwanegol, datblygu arweinyddiaeth a dysgu proffesiynol.

Casgliad

Yn 2021, bydd Cyngor Sir Powys yn llunio Cynllun Strategol y Gymraeg mewn Addysg (y Cynllun) manwl ar gyfer y degawd nesaf.

Bydd y ddogfen weledigaeth hon, a gymeradwyir gan y Cabinet, yn llywio cynnwys y Cynllun. Wedi hynny fe ddaw'n ddogfen orfodol i sicrhau darpariaeth fwriadol ar gyfer cynyddu'r cyfleodd i nifer cynyddol o blant a phobl ifanc ym Mhowys i ddod yn gwbl ddwyieithog.



A vision for increasing the number of fully
bilingual learners in Powys

December 2020



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About

In March 2020, the local authority set out a clear ambition for its schools, that:

“All children and young people in Powys will experience a high quality, inspiring education to help develop the knowledge, skills and attributes that will enable them to become healthy, personally fulfilled, economically productive, socially responsible and globally engaged citizens of 21st century Wales.”

The extensive engagement held with a wide range of stakeholders over the preceding months had underlined, with great clarity, that change is necessary at some pace for the Powys schools’ system. Underpinning the need for change is the widespread feeling that the schools’ system is no longer suited for the delivery of an inclusive, modern arrangement to meet the needs of all learners. It was also clear that stakeholders are insistent that it is the Council’s responsibility to frame and set a strategic direction as a matter of urgency, to tackle the acknowledged shortcomings. There is a strong consensus, expressed frequently during the engagement that changes are needed to have more accessible schools that can support learners who learn in Welsh – offering the full curriculum from the age of 4 to 18.

The evidence from the rest of Wales is that Welsh-medium/bilingual provision offers the best opportunity for learners to become fully bilingual,

whilst also creating a dynamic outward looking cultural environment. These are schools that operate in Welsh, and which meet the needs of learners from diverse backgrounds across Wales, including learners who arrive in Wales after they have started their education. Provision in these schools, like similar schools around the world, enable all learners to become fully bilingual young people.

In April 2020, the Transforming Education Strategy was adopted on behalf of the Cabinet, which included the following commitment to the future of education in Welsh for learners in Powys.

“Strategic Aim 3: We will improve access to Welsh-medium provision across all key stages”

The purpose of this aim is to ensure that, in future, a growing number of children can access Welsh-medium education from early years to their school leaving age.

From the evidence gathered during the engagement exercise, it is apparent that there is no equality of provision for Welsh-medium learners across the county, and the level of Welsh-medium provision available is a postcode lottery. In addition, learners in Powys do not have access to a Welsh-medium secondary school.

The Council’s new **Welsh in Education Strategic Plan 2021-2031** will be fully aligned with this Strategy and will include additional actions to support this Strategic Aim.

Terminology

There has been lack of clarity regarding the meaning of terminology relating to the language status of schools.

Across Wales, a **Welsh-medium school** is understood to be a school where every learner in the school is taught and supported to be entirely bilingual in Welsh and English (whilst they also study modern foreign languages). As they work to provide a curriculum to support bilingualism for all learners, it is not uncommon for them to be called **bilingual schools**.

In Powys, there are no Welsh-medium/bilingual secondary schools in the sense noted above i.e. there are no secondary schools which work to ensure the bilingualism of all learners. There are **dual-stream secondary schools** across the county. These are schools where only some of their learners are educated in a way that will enable them to become fully bilingual by the time they leave school. In these schools, some learners have their curriculum in English, and others have their curriculum in a mix of English and Welsh. In essence, in the same school, there are learners who are having a bilingual education and others who are having an English language education. The proportions in our dual stream schools across Powys are:

School	No. of Pupils in Welsh/Bilingual Stream	No. of Pupils in English Stream
Builth C.P. School	108	93
Rhayader C. in W. School	65	136
Sennybridge C.P. School	54	82
Ysgol Bro Hyddgen (Primary)	112	54
Ysgol Dyffryn Trannon	96	14
Ysgol GG Llanfair Caereinion	86	75
Ysgol Llanfyllin (Primary)	67	63
Ysgol Llanrhaeadr ym Mochnant	38	36
Ysgol Rhiw Bechan	61	94
Ysgol Trefonnen	88	120
Brecon High School	30	549
Caereinion High School	253	211
Llanidloes High School	106	544
Ysgol Bro Hyddgen (Secondary)	186	110
Ysgol Calon Cymru	142	854
Ysgol Llanfyllin (Secondary)	158	525

Pupil numbers as of 13th October 2020

This contrasts with much of Wales where there are designated schools that set out to ensure the bilingualism of every learner, and others which operate in English only. In Wales, there are 3 authorities without designated Welsh-medium/bilingual schools – Powys, Monmouthshire, and Blaenau Gwent. However, Monmouthshire and Blaenau Gwent have had firm arrangements for 30 years with Newport and Torfaen to offer a full Welsh-medium/bilingual provision in their secondary schools.

The assumption by some that a dual-stream school is the same as a bilingual school has often hampered discussions with stakeholders about the future planning of education.

What is the difference?

Welsh-medium or bilingual school

These are schools where:

Learners

- Every learner in the school is expected to become fully bilingual in Welsh and English.
- All pupils study both English and Welsh to first language standard, including for external examinations and also study a modern foreign language.

Curriculum

- The curriculum is delivered mainly through the medium of Welsh.

Language of the school

- The administrative and social life of the school for pupils and staff is conducted in Welsh.

Extra-curricular

- Extra-curricular activities are usually conducted in Welsh, but students access national activities in both languages

Engagement with parents

- Engagement with parents happens entirely bilingually or according to parental choice. Whilst the learners are fully bilingual, most parents might not be.

Dual-stream school

These are schools where:

Learners

- Some learners are enabled to become fully bilingual while other learners in the school study in English only.
- The learners in the Welsh/bilingual stream study Welsh and English as first languages and are expected to be fully bilingual, Learners in the English stream study English to first language standard and Welsh as a second language, and it is not designed for them to become fully bilingual by the end of their time at school.

Curriculum

- In the main, the entire curriculum is available in English for all learners. A part of the curriculum is available in Welsh for those who are in the Welsh/bilingual stream (which varies greatly from school to school).

Language of the school

- Usually, the social language of the school is determined by its leadership and staffing, and by the proportion of learners who study in either language.

Extra-curricular

- Extra-curricular activities are usually conducted in both English and Welsh.

Engagement with parents

- Engagement with parents happens entirely in Welsh and/or English depending on the ability of staff to communicate through the medium of Welsh or according to parental choice.

Recent public engagement

During our public engagement exercises conducted last year, concerns were expressed around the current provision of education in Welsh in Powys. Some of these included:

- Not all parts of Powys have easily accessible primary or secondary education through the medium of Welsh – currently there is no provision in the Presteigne, Crickhowell or Gwernyfed areas.
- Many schools that do provide a dual-stream approach do not deliver enough of their curriculum in Welsh to satisfy their learners. Provision is patchy, and unequal in too many of the secondary schools. It is common for under half of the curriculum to be available in their language of choice for learners in the Welsh stream of secondary education from year 7.
- The choice of subjects taught through the medium of Welsh becomes smaller as the learner gets older, and at post-14 the provision is very poor or non-existent. This includes deficiencies in the provision by the Further Education provider. In some secondary Welsh streams, fewer than 5 GCSE subjects are delivered through the medium of Welsh, and in one case only one non-language course is taught in Welsh. Some respondents queried how we could refer to schools as 'dual stream' if for some learners they can only choose from one or two subjects in Welsh.
- There is evidence that some parents in Powys avoid choosing an education through the medium of Welsh because they are concerned that the progression available for their child within the authority will be limited. This has been reported by headteachers at primary level who are frustrated by the lack of provision after their learners transition to secondary education.
- At a time when bilingual/Welsh education has grown across Wales and is often a showcase sector for other counties, Powys has been stagnant, and in some key indicators the local authority has been going backwards. This has happened despite commitments made in the Powys Welsh in Education Strategic Plans over recent years.
- Powys has a smaller percentage of its children learning through the medium of Welsh than the percentage of Welsh speakers in the wider population. It is believed to be the only authority in Wales where this is the case.

The views expressed in the engagement process are particularly disappointing given that in 2017 Powys Council published clear objectives for its Welsh in Education Strategic Plan¹.

Powys Welsh in Education Strategic Plan 2017-2020

In the 2017 Plan, the Council acknowledged the deficiencies in its historic planning for Welsh-medium education and expressed the need to move towards designated Welsh-medium schools in both primary and secondary phases and **included the following priorities:**

Objective 1 - To increase the opportunities for pupils to access Welsh-medium early years provision

Objective 2 - To establish, and identify opportunities to establish, new designated Welsh-medium provision in the primary sector

¹ https://en.powys.gov.uk/media/3436/Welsh-in-Education-Strategic-Plan-2017-20/pdf/WESP_2017-20_-_Final_English.pdf

Objective 3 - To provide equitable and sustainable linguistic progression for Welsh-medium pupils from Key Stage 2 into Key Stages 3, 4 and 5

Objective 4 - To provide improved opportunities for latecomers to transfer to the Welsh-medium sector in all stages of education.

In 2020, it is clear that these objectives continue to be a priority for the local authority because of a general failure to achieve these goals over the last decade. It must now make progress in each of these areas. There was clear support for the direction of travel in the engagement exercise with the public in the first months of 2020, but there is a risk of a loss of faith in the Council unless it now acts to bring forward effective proposals to deliver these objectives.

Strategy for Transforming Education in Powys 2020-2030

In April 2020, the Leader of the Council exercised her delegated powers to urge officers to make progress with bringing forward a wide raft of proposals. Those proposals should reflect an agreed set of guiding principles for transforming the Powys schools' system.

- ✓ A world class rural education system that has learner entitlement at its core
- ✓ Schools that are fully inclusive, with a culture of deep collaboration in order to improve learner outcomes and experience
- ✓ A broad choice and high quality of provision for 14 – 19 year old learners, that includes both academic and vocational provision, meeting the needs of all learners, communities and the Powys economy
- ✓ Welsh-medium provision that is accessible and provides a full curriculum in Welsh from Meithrin to age 19 and beyond
- ✓ Provision for learners with Special Educational Needs (SEN)/Additional Learning Needs (ALN) that is accessible as near to home as is practicably possible, with the appropriate specialist teaching, support and facilities that enables every learner to meet their potential
- ✓ A digitally-rich schools sector that enables all learners and staff to enhance their teaching and learning experience
- ✓ Community-focused schools that are the central point for multi-agency services to support children, young people, families and the community
- ✓ Early years provision that is designed to meet the needs of all children, mindful of their particular circumstances, language requirements or any special or additional learning needs
- ✓ Financially and environmentally sustainable schools
- ✓ The highest priority is given to staff wellbeing and professional development

Building a bilingual future for Powys and its young people

In addition to developing the workforce, the local authority needs to focus on growing the opportunities for children to learn in Welsh in Welsh-medium or bilingual settings. This must include ensuring that there are specialist staff who are able to support learners with additional learning needs or special educational needs and ensuring that the schools are able to support all learners.

1. Powys needs to normalise Welsh-medium/bilingual education.

Children in Welsh-medium/bilingual education study both Welsh and English as first languages, and it is the surest way to become bilingual in Wales. Outcomes in English language and literature GCSE and A levels are comparable across Welsh-medium and English medium schools. In other words, students do not have poorer outcomes in English simply because they've been educated in Welsh. Similarly, students do not have poorer outcomes in mathematics and science because they've been educated in Welsh-medium schools, including schools where the vast majority of the children come from non-Welsh speaking homes.

Approximately 70% of the world's population is bilingual – it's not unusual, and it's not unusual in Wales, especially for younger people.

Being bilingual should be a realistic aim for most learners in Wales, because of the benefits of being a confident user of more than one language. Some of these benefits have been widely published and can be summarized as follows:

- Learners who understand more than one language think more creatively and with more flexibility and tend to do better in IQ tests
- Being bilingual has a positive effect on the brain by keeping it active later in life
- Being bilingual can reduce the risk of dementia
- In Wales, being able to speak Welsh fluently is a valuable extra skill, with benefits for businesses and the individual
- Being bilingual gives access to two different cultures and two worlds of experience
- Bilingual people find it easier to learn a third language and often show more tolerance towards other cultures.
- Across Wales, bilingual children tend to achieve better results – including in English.
- Research shows that being bilingual doesn't hold you back – in fact the opposite is true. Bilingual children do better in Science and Mathematics reasoning tests (Prof Colin Baker, International Expert in Bilingual Education).

Making bilingual education a normalised provision and a natural entitlement are essential if we are to make progress in this domain. To support the normalisation of bilingualism, authorities across Wales have also identified ways in which other services, such as youth services and services for learners with ALN/SEN can be developed.

2. Powys County Council and its partner in Mudiad Meithrin need to work together to ensure that Welsh nursery and early years provision is available to every child.

Mudiad Meithrin, the Welsh Nursery School Movement, established in 1971 operates across Wales (and Patagonia) to help families give their children the best opportunity to become naturally bilingual.

The Cylch Ti a Fi gives parents/carers of babies/young children the opportunity to meet once a week to socialise, share experiences about parenting skills, and to play together in an informal Welsh atmosphere. In the Cylch Ti a Fi you can enjoy making new friends, playing with toys, learn to sing simple Welsh songs and listen to Welsh stories with your child. Children can be taken to a Cylch Ti a Fi from about 6 months old.

The Cylch Meithrin is a Welsh-medium playgroup which offers your child an opportunity to socialise with other children and learn through play under the guidance of professional and qualified staff. By attending the Cylch Meithrin your child will begin his/her journey to Welsh-medium education and will develop into a confident individual ready to take the next natural step into Welsh-medium education at your local school. Children start in a Cylch Meithrin (Welsh Nursery School) from 2 ½ years old.

The local authority, as it rolls out its transformation programme will need to consider opportunities for facilities to be developed for use by Mudiad Meithrin and other partners who can enhance the offer for the parents of young children. This should include careful analysis of the wrap-around care available for families, so that provision in Welsh can align with the provision by the Cylch Meithrin and the primary school.

3. Powys needs to welcome newcomers to their locality, many of whom are new to Wales. We should also welcome those who wish to choose a Welsh-medium education after initially choosing English medium provision for their child, by offering opportunities for immersion (rapid language learning) and an opportunity to join and be fully integrated into a Welsh-medium/bilingual classroom.

No children should be excluded from the opportunities to have an education through the medium of Welsh – even if they arrive in Wales part way through their education. Powys County Council is in the process of establishing Welsh Language Centres, which will offer intensive Welsh courses for pupils moving to the area or pupils currently attending English-medium education who would like to transfer to Welsh-medium education. Welsh language centres are established across Wales as an effective and successful way of immersing children in the Welsh language and enabling them to transfer effectively to Welsh-medium education. Children acquire languages very easily with a positive mindset and effective teaching. This works across the world and in other parts of Wales and will be rolled out in different parts of Powys in the near future.

4. Powys needs to have a network of Welsh-medium/bilingual primary providers in every locality across the county.

Across Wales, Welsh-medium/bilingual education is for all – not for the children of families that currently speak Welsh or for any social or ethnic group. The recent global feel to the online COVID National Eisteddfod was enormously enhanced by young people from Afro-Caribbean, Asian and Arabic ethnic backgrounds who had been educated in Welsh and who are contributing significantly to the present and future of Wales. This does require a change in mindset in Powys, so that the Welsh language can in future be owned by all of our young people, through a vibrant education system that aspires to create fluent speakers across the authority. Some areas currently have no provision for Welsh/bilingual primary education e.g. the Crickhowell, Hay/Talgarth, and Presteigne areas.

Some schools are already keen to move along the language continuum. This means that while they currently have only a certain percentage of their learners using Welsh fluently every day, they want to work to a point where more, or all of their learners can leave school as full bilinguals or multi-linguals. Schools need to be given the time and the support to make this possible, while at the same time the local authority should seek to ensure that a full provision in Welsh is available within reasonable travelling distance for every child and young person in Powys.

This could be tackled in the short to medium term by a range of options e.g. developing dual stream facilities where none exist at the moment, and in other cases by supporting schools to move from being dual stream to being ones that aspire to full bilingualism for all their learners, thus becoming Welsh-medium or bilingual schools. Other options could include moving foundation phase to an offer in Welsh, and then allowing all learners to grow through the school with the expectation of full bilingualism for all.

5. Powys needs to develop a mutually supportive network of secondary providers that is able to offer a full curriculum across Powys in Welsh at all key stages

Quite simply, the current model of 6 dual stream schools at secondary level is not working well enough to offer the full educational provision in Welsh for our young people. It is simply not generating the numbers of bilingual learners that Powys should be contributing to the future of our society and economy, with the opportunities that can present our young people. In the main, small numbers of pupils are learning in Welsh in those schools, and the curriculum provision for them is incomplete. Levels of participation by Powys secondary pupils in Welsh language national events designed for schools is poor, and the opportunities for effective participation in both the formal and informal curriculum must be tackled. The opportunities to celebrate Welsh art, music, drama and much else are usually lost and schools rarely feature nationally amongst the range of Welsh-medium/bilingual schools that exist across Wales.

Across Wales, Welsh-medium/bilingual secondary provision is normal. In areas that had become largely English speaking during the 20th century there are vibrant and large Welsh-medium secondary schools – in Torfaen, Newport, South Pembrokeshire, Wrexham, and Flintshire. Powys does not currently have a designated Welsh-medium secondary school, and the feedback in our winter 2019/20 engagement suggested clearly that this is an inhibitor to the growth of the primary sector in Powys.

A clear plan should be put in place to ensure that our young people have the same opportunities as young people in the rest of Wales to pursue their education in Welsh through to the end of secondary school, ensuring that they are fully bilingual and able to play their full part in the whole of the life of Wales, and beyond.

The transformation programme should seek to ensure that both primary and secondary Welsh-medium/bilingual provision is made available in all corners of Powys.

The future of provision in Powys

The evidence from the rest of Wales is that bilingual/Welsh-medium provision offers the best opportunity for learners to become fully bilingual, whilst also creating a dynamic outward looking cultural environment

Following the decision taken to ensure that Powys is committed to developing all-age schools in key localities across the county, it is essential that we explore how bilingual/Welsh-medium provision can be available for pre-school and primary aged pupils across each locality, with an assured progression within reasonable distance through the full range of secondary education and beyond.

Towards 2030: What needs to be done to increase the opportunities for more young people in Powys to be fully bilingual by 2030.

1. Every family will be clear about the opportunities for bilingual and Welsh language learning that will be available for their young infant well before the time when they make choices about schools. The local authority and its partners will ensure co-ordinated sign-posting of provision for the parents of young children across Powys, and ensure that the option of Welsh-medium provision is known to all and provision from early years will be available in each part of Powys. This should include the notion of an "active offer" i.e. when queries are made about admissions to schools or childcare (no matter the background or location of the families), an effort is made by all officials to explain the benefits and availability of WM education.
2. There will be early years and primary provision in each of our 13 secondary localities to enable parents to make a realistic choice of a bilingual/Welsh-medium provision for their child. Increasingly, there will be more than one provider available in each of the 13 localities. These providers should all seek to align with the work of Mudiad Meithrin and provide wrap around care support.
3. There will be a planned programme of immersion available to support families who are new to the area to help their child settle into a bilingual/Welsh-medium provision, and a means to support parents and learners already in a Powys school who would like to switch to a bilingual/Welsh-medium provision during the child's primary education or at transition to secondary school.
4. Dual stream schools will be available where there is no practicable option to have a single-stream school, but in the main the local authority will have developed schools as clearly defined single-stream providers. New bilingual/Welsh-medium provision might be developed through opening a new bilingual/Welsh-medium school, facilitating a time-limited dual stream or a seedling class² to support their establishment.

² These have been used successfully in other parts of Wales. These exist when an English medium school with surplus capacity offers some of its rooms for the opening of a new Welsh-medium provision that starts with pupils from the youngest age up. That WM provision will usually have a teacher-in-charge on the site, and be supported by a neighbouring WM school, including its headteacher. When the seedling class is established, it either becomes a school, in its own right on its current site, or it moves to a purposely designated site.

5. Every primary year 5/6 class learning in Welsh will be part of a cohesive transition arrangement to a specified bilingual/Welsh-medium secondary school, with significant collaboration between the secondary and its primary partners to secure effective transition for all learners.
6. Children with special educational needs will be well supported in Welsh, either in their local bilingual/Welsh-medium school or through effective collaboration with a more specialist setting in Powys.
7. At secondary school, every learner who is studying in Welsh will be able to access the entire Curriculum for Wales through the medium of Welsh, supported by effective collaboration across the sector to ensure that no bilingual/Welsh-medium setting is too small to offer the whole range of the curriculum in Welsh. In addition to accessing the curriculum in Welsh, the learners should also be able to benefit from a school environment that immerses them in Welsh culture, art, drama, music and where the daily life and business of the school is conducted in Welsh.
8. At Post-16, through collaboration across schools and with other providers, there will be an extensive offer of subjects available in Welsh, in line with other parts of Wales.
9. The bilingual/Welsh-medium sector across Powys will work as an extended collaboration with the local authority (and with others across Wales) to develop the curriculum offer and entitlement, the support for learners with additional needs, the development and learning of the workforce and the leadership of both schools and the local authority.
10. The local authority will ensure that centrally managed services offer a more equitable service in both languages to support learners (and staff) in our schools in areas such as youth services, ALN support, leadership development and professional learning.

Conclusion

In 2021, Powys County Council will produce a detailed Welsh in Education Strategic Plan (WESP) for the next decade.

This vision document, approved by Cabinet, will form the basis of the contents of that WESP, which will then become the binding document to ensure well planned provision for increasing the opportunities for a growing number of children and young people in Powys to become fully bilingual.

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CYNGOR SIR POWYS COUNTY COUNCIL.**CABINET EXECUTIVE
15th December 2020**

REPORT AUTHOR: County Councillor Phyl Davies
Portfolio Holder for Education and Property

County Councillor Aled Davies
Portfolio Holder for Finance

REPORT TITLE: Amendments to the School Funding Formula

REPORT FOR: Decision

1. Purpose

- 1.1 To seek Cabinet's approval for amendments to the School Funding Formula (SFF).

2. Background

- 2.1 Prior to the pandemic, the intention had been to review the whole fair funding formula that distributes funding to Powys schools to ensure that the distribution formula meets the needs of the schools in the future, during and following the Transforming Education programme. However, reluctantly, it was agreed (through the Head of Finance, the interim Chief Education Officer, Schools' Budget Forum and the Formula Review Group (FRG)) that this review would need to be postponed during the pandemic period (where the Council was operating on a Business Critical basis) and would not take place during 2020. Work on this will begin in the new year.
- 2.2 The methodology for delegating funding for Special Educational Needs (SEN) / Additional Learning Needs (ALN) in mainstream schools was highlighted as an area that needed urgent review, particularly for primary schools. This is due to the current methodology not providing sufficient funding for schools attended by mainstream pupils with significant SEN/ALN. In addition, the current methodology is based partly on the numbers of pupils with statements of SEN and one of the implications of the Additional Learning Needs and Educational Tribunal (Wales) Act (the ALN Act) is that in the future statements of SEN will no longer exist. As a result of this, the current methodology will no longer be fit for purpose.
- 2.3 An ALN formula sub-group of the FRG was established to work through the current issues and options for improvement.

- 2.4 Any changes to the School Funding Formula must undergo a consultation process with all schools and be agreed with the Schools' Budget Forum prior to implementation.
- 2.5 It should be noted that the development of a funding formula for the future schools' estate to support the Education Transformation programme will encompass all areas of the formula, but this will be subject to further consultation and a phased implementation over a number of years.

3. The Need for Change

- 3.1 The key principles driving these proposals are:
- In line with the ALN Act and the Powys ALN Strategy, the needs of most pupils with SEN/ALN should be met by schools within mainstream classes.
 - Pupils with SEN/ALN should only attend special schools when their needs cannot be met in specialist centres or mainstream classes.
 - Pupils with SEN/ALN should only attend specialist centres when their needs cannot be met in mainstream classes
 - Delegated funding should target those pupils who need it most but also enable schools to provide an inclusive education for pupils with a wide range of needs.
 - Schools should receive funding to give them flexibility to provide a fully inclusive education for all pupils.
 - Where pupils in mainstream classes have a high level of need, additional funding should be delegated to schools and should be used to support these pupils.
 - The funding methodology should allow for additional funding to be allocated to schools for those pupils whose needs are identified in-year or those who move into a Powys school during the year.
 - Any change in distribution methodology must be managed within the same overall budget

Current Challenges

- 3.2 Currently each primary school receives an element of SEN/ALN funding which is based on a range of proxy indicators e.g. the number of primary pupils not achieving the core subject indicator (CSI) at KS2 at that particular school. The purpose of this funding is to provide support and resources for a wide range of pupils with SEN/ALN. Some pupils with a high level of need have a statement of SEN which sets out the support

they will require. Under the current methodology, schools are required to use all of their general SEN/ALN allocation described above before they can receive any additional funding to provide the support needed for these stated pupils. This means that these schools then have very little funding to develop support for learners with less complex needs and inhibits early identification and intervention.

- 3.3 This can be seen as a disincentive for schools to accept pupils with more complex needs, which runs counter to the aim of the new Powys ALN Strategy of a fully inclusive education system supporting participation fully in mainstream education wherever feasible.
- 3.4 A further area that needed to be reviewed urgently was the funding of mainstream schools which have local authority funded specialist centres. Currently, general school budgets are based on the number of classes provided, and do not take into consideration all of the pupils who attend the specialist centres. Headteachers feel that this is unfair. Many have expressed the view that all specialist centre pupils should be included in the numbers considered in relation to the general school budgets. The local authority must be mindful of the requirements of section 13 paragraph 2 (b) of the School Funding (Wales) Regulations 2020 (see below).

4. Consultation Proposals

- 4.1 The full consultation paper detailing the proposed changes can be found at Appendix A and is summarised below.
- 4.2 For the distribution of ALN funding to primary schools, the proposed changes should target learners with the greatest needs, while also providing schools with a base level of funding to support all learners with SEN/ALN.
- 4.3 Every year schools are required to enter information onto the Pupil Level Annual School Census (PLASC) in relation to pupils with Special Educational Needs. This information indicates the type of support and provision that is required by individual pupils. The consultation proposed that this categorisation be used to target funding at those learners identified on PLASC as having more complex needs.
- 4.4 The base level of funding for all schools be based on a combination of the number of learners on the SEN register and the number of learners entitled to Free School Meals (eFSM), which is widely used as a proxy measure for deprivation.
- 4.5 A budget should be retained as a contingency for any new pupils identified as having significant needs.

- 4.6 In order to ensure consistency between schools, a system of moderation should be introduced, involving ALNCos and scrutiny of provision maps by LA officers.
- 4.7 For mainstream schools with specialist centres, their formula funding should be based on the number of pupils on roll who only attend the mainstream setting e.g. if the school has 100 pupils on roll, 4 of whom attend its 12-place specialist centre, the school receives its mainstream funding on the basis of 96 pupils. This will bring the formula in line with the School Funding (Wales) Regulations 2010.
- 4.8 Local authority officers should meet with the headteacher and specialist centre teachers on an annual basis to agree on any additional requirements.

5. Consultation Findings and Responses

- 5.1 Overall, the number and quality of responses were disappointing. 22 responses were received to the consultation (10 from primaries and 11 from secondaries, with one nil return) representing 9 primary schools and 5 secondary schools.
- 5.2 Appendix B provides more detail of the responses along with officer commentary. In summary:
- 22.7% of respondents were supportive of simplifying the proxy indicators used to provide a base level of funding for ALN provision (63.6% were neither supportive nor unsupportive and 13.6% were not supportive);
 - 36.4% of respondents were supportive or very supportive of using PLASC categories to provide targeted funding for ALN provision (59.1% were neither supportive nor unsupportive and 4.6% were not supportive);
 - 31.8% of respondents were supportive or very supportive of providing top up funding if required for statements or banding (59.1% were neither supportive nor unsupportive and 9.1% were not supportive);
 - 27.3% of respondents were supportive or very supportive of a system of moderation (63.6% were neither supportive nor unsupportive and 9.1% were either not supportive or not at all supportive);
 - 63.6% of respondents were not at all supportive and 13.6% were not supportive of the proposal to fund the mainstream schools with specialist centres based on pupils on roll that do not attend the specialist centre (13.6% were supportive or very supportive

and 4.6% were neither supportive nor unsupportive, with one nil response;

- 63.6% of respondents were supportive or very supportive of annual meetings between local authority officers and the headteacher and specialist centre teachers to agree any additional requirements (31.82% were neither supportive nor unsupportive, with 1 nil response);

6. Proposed Way Forward

Primary Schools

- 6.1 It is proposed that elements 1 and 3 should be adopted in April 2021 as described in the consultation paper. However, it is proposed that element 2 should not be adopted until a later date, giving the local authority and schools time to come to consensus as part of wider budget discussions:

Element 1: Simplified Proxy Indicators – providing a base level of funding for all schools

Indicator	Weighting
Number of pupils on the SEN Register (from PLASC)	80%
Free School Meals (FSM) entitlement ¹	20%

- 6.2 SEN and FSM data would be averaged over the most recent 3 years available to smooth the impact of changes from one year to another.

Element 2: Allocation based on the number of pupils in certain PLASC categories

- 6.3 Further analysis has taken place since the proposals were put out to consultation and it is clear that there are significant inconsistencies between schools in terms of the pupils that are allocated to the PLASC categories that the proposals for element 2 relate to. Officers are of the view that this part of the proposals should be delayed in order that guidance can be provided to schools and a moderation process implemented so that the data is more consistent across all schools.
- 6.4 There is a risk to the implementation of this element related to the capacity within the central ALN teams which need to be in place in order

¹ FSM is used as a proxy for deprivation and is widely used by Welsh Government for resource distribution. The group discussed using the Welsh Index of Multiple Deprivation (WIMD) but this was discounted as it is not considered suitable by WG's Distribution Sub Group and the data is not readily available in Powys.

to secure this consistency across Powys. Current restrictions on recruitment due to Covid may make this impossible.

- 6.5 As an interim measure, officers propose that the funding targeted at pupils with significant needs be based on the requirements of their statement of SEN or banding, reduced by the individual pupil amount delegated to the school through the simplified proxy indicators, as part of their SEN/ALN allocation.

Element 3: Top Up Funding

- 6.6 A sum of money will be retained centrally to be distributed to schools to support pupils whose needs are identified during the year, or who arrive at a Powys school during the year.

Specialist Centre funding

- 6.7 In line with the School Funding (Wales) regulations (see below), pupils in the specialist centres should not be included in the pupil numbers used when calculating overall school budgets. Officers should work with schools on an annual basis to determine the amount of funding required to support the integration of specialist centre pupils into mainstream classes

13.—(1) In determining budget shares for maintained nursery, primary and secondary schools, a local authority must take into account in their formula the number of registered pupils at those schools on such dates as may be determined by them weighted if the authority consider it appropriate in accordance with paragraph (7).

(2) For the purpose of paragraph (1), the number of registered pupils does not include—

(a) pupils in respect of whom grant is payable to the authority by the Welsh Ministers under section 36 of the 2000 Act;

(b) pupils in places which the authority recognise as reserved for children with special educational needs or (except where the local authority chooses not to exercise their discretion under regulation 15 in respect of children in nursery classes) for children in nursery classes.

7. Resource Implications

- 7.1 Finance – All of the proposals are expected to be managed within the existing overall budget for ALN funding distributed to schools. The Schools' Finance Manager supports the proposals and will amend the funding formula to reflect the changes once agreed. The Schools' Finance team will continue to support schools to manage the changes that arise from the formula review.
- 7.2 HR – The Schools' HR team will continue to work with Headteachers, Staff, Governors, Trades Unions and other officers of Powys County Council to ensure that any changes that are required will be made in line with the School's adopted policies and procedures
- 7.3 The Head of Finance (s151 Officer) comments as follows: "I note the comments of the Schools' Finance Manager. The proposals recognise a number of funding issues identified by schools and the inclusion of these elements within the funding formula will enable schools affected to manage cost pressures that arise"

8. Legal implications

- 8.1 Professional lead notes the recommendations and the issues identified by finance and how these will be addressed following the formula review. Legal services will assist where necessary to ensure compliance with the relevant legislative provisions.
- 8.2 The Head of Legal and Democratic Services (Monitoring Officer) comments as follows: "I note the legal comment and have nothing to add to the report".

9. Data Protection

- 9.1 The proposal does not involve a change in the processing of personal data.

10. Comment from local member(s)

- 10.1 All schools across the council may be impacted by changes to the school funding formula therefore all local members have an interest.

11. Integrated Impact Assessment

- 11.1 The proposals support the principles of the ALN Act and meet the requirements of the new Powys ALN strategy.

- 11.2 The proposal will ensure that funding for SEN/ALN will be targeted at those with the greatest need while also supporting schools to provide high-quality education for pupils with a wide range of needs.
- 11.3 They will underpin closer working between the authority and its schools and secure greater consistency.
- 11.4 A financial impact assessment has been undertaken to assess the level of change in funding levels to individual schools. Where the changes in funding to individual schools are considered to be unmanageable, a self-funding damping mechanism will be put in place to support schools through the transition.

12. Recommendation

12.1 It is recommended that:

From April 2021

- Funding for learners in mainstream primary schools will be delegated through
 - a) an interim arrangement of targeting funding at those learners with the highest need based on the statement of SEN or banding, taking into account the individual pupil amount delegated for SEN/ALN
 - b) provision of a base level of funding based on a combination of the number of learners on the SEN register (80%) and the number of learners entitled to Free School Meals (eFSM) (20%) to support pupils with a wide range of needs
 - c) top up funding where new pupils are identified as having significant needs
- A system of moderation be introduced in order to ensure consistency between schools, involving ALNCOs and scrutiny of provision maps by LA officers.
- The formula funding for the mainstream schools with specialist centres is based on pupils on roll that do not attend the specialist centre, to ensure that the formula complies with the School Funding (Wales) Regulations 2010;
- Where schools host a local authority funded specialist centre, officers will meet with headteachers and specialist centre teachers on an annual basis to agree resource requirements; and that

- If any changes in funding to individual schools are considered to be unmanageable, a self-funding damping mechanism be put in place to support schools through the transition.

Beyond 2021/22:

- Instead of receiving funding linked to the statement or banding, schools will receive funding based on the number of pupils identified through the PLASC data (as explained in the report).

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The Funding Formula (2021-22)

Consultation Paper

Overview

Prior to the pandemic, the intention had been to review the whole fair funding formula that distributes funding to Powys schools to ensure that the distribution formula meets the needs of the schools in the future, during and following the Transforming Education programme. However, reluctantly, it was agreed (through the Head of Finance, the interim Chief Education Officer, Schools Forum and the Formula Review Group) that this review would need to be postponed during the pandemic period (where the Council was operating on a Business Critical basis) and would not take place during 2020. Work on this will begin in the new year.

The methodology for delegating funding for Special Educational Needs (SEN) / Additional Learning Needs (ALN) in mainstream schools was highlighted as an area that needed urgent review, particularly for primary schools. The implementation of the Additional Learning Needs and Educational Tribunal (Wales) Act (the ALN Act) will also see statements of SEN being gradually replaced by Individual Development Plans (IDPs).

An ALN formula sub-group was established to work through the current issues and a range of options for improvement. The council considered all of the views given by the group and has put forward the following consultation document which sets out the proposed changes and seeks your views on these.

An impact assessment will be undertaken and if the changes in funding to individual schools are considered to be unmanageable, a self-funding damping mechanism will be put in place to support schools through the transition.

All proposed changes and any transitional arrangements will have to be managed within the same overall budget amount.

It should be noted that the development of a funding formula for the future schools estate after the Education Transformation programme will encompass all areas of the formula, but this will be subject to further consultation and a phased implementation over a number of years.

Why we are consulting

We have a statutory duty to consult on the funding formula for schools. In addition, we feel it is good practice to do so and are interested in your views.

Background

The total funding for SEN / ALN provision distributed to schools in 2020-21 is £5,906,833. The distribution methodology differs between the primary and secondary sectors as shown in Table 1 below. Please note these figures will change as a result of pay awards and pupil number changes in future years.

Schools are expected to use some of their general funding to support pupils with SEN / ALN.

Table 1: 2020-21 delegated funding for SEN / ALN provision

	Primary	Secondary	TOTAL
Formula led:	£	£	£
Additional Learning Needs Coordinator (ALNCo)	732,740	394,488	1,127,228
Proxy Indicators	2,154,118	-	2,154,118
Pastoral Support	-	311,629	311,629
Small Class Size	-	1,870,342	1,870,342
Total Delegated via formula	2,886,858	2,576,459	5,463,317
Exceptional Needs / "Top Up" Funding:			
Current Banding Top Up Commitment	91,428	352,088	443,516
Current Spend Sub-Total	2,978,286	2,928,547	5,906,833
Remaining Exceptional Needs Budget for panel			306,484
TOTAL			6,213,317

For both sectors there is a top up based on the banding system used by Powys County Council. All pupils with a statement of Special Educational Needs (SEN) are banded from 1 to 10 according to need. There is an expectation that, where possible, schools will cover the cost of the banding from their delegated funding. However, where this is not possible, additional Band led top-up funding is provided.

The authority holds a central budget of £0.75m for pupils with exceptional needs with allocations being agreed through a panel. This includes funding for pupils

who arrive at a school during the school year and current banding top up where the delegated funding is not sufficient. This amount and how it is accessed will be reviewed for both primary and secondary following the outcome of this consultation by officers in collaboration with school representatives.

Delegation of funding to support SEN / ALN provision in Secondary Schools

Current System

For **secondary** schools, SEN / ALN funding distribution is based on three main elements. The first element related to funding the Additional Learning Needs Coordinator (ALNCo), based on funding equivalent to 0.1 FTE teacher per 100 pupils (on average this equates to £5,800).

The second element relates to funding for pastoral support equivalent to 1 Grade 7 (mid point, term-time only) which is not based on pupil numbers.

The remaining funding is used to fund small classes of 15 pupils in each year group in each language stream.

In addition, there is the “top up” funding for banding referred to above.

Proposals for change

Following discussion with the ALN formula sub-group, the Council has decided that, with the exception of specialist centres, it will not change the ALN funding distribution method to secondary schools at this point. This will be reviewed as part of the wider review beginning in 2021.

1. Delegation of funding to support SEN / ALN provision in Primary Schools

Current system

For primary schools, there are two main elements to the formula led distribution. There is an initial amount to fund the ALN Coordinator (ALNCo) with the remainder being distributed via a formula based on proxy indicators.

The amounts provided for ALNCo costs depend purely on pupil numbers. Schools with 100 or fewer pupils will receive funding equivalent to 0.1 Full Time Equivalent (FTE) teacher (on average this equates to £5,800). For schools with more than 100 pupils, they receive an additional 0.1 FTE per 100 pupils or part thereof. In the current financial year this allocates £732,740 to primary schools.

£2,154,118 of the SEN / ALN funding for primary schools is then distributed via a formula based on proxy indicators (see Appendix A).

In addition, there is the “top up” funding for banding referred to above. Schools are expected to use the whole of their delegated funding before they receive a top up amount for a single pupil.

Proposals for change

Following discussion with the ALN formula sub-group, it was agreed not to change the ALNCo funding element.

It is proposed that the remainder be distributed on a combination of simplified proxy indicators (Element 1) and PLASC SEN / ALN category data (Element 2 - see Appendix B for details of PLASC categories), supplemented by top up funding for banding / statements (Element 3) where required during the transition period, as described below.

The amount allocated through each element will vary depending on the number of pupils within the PLASC categories used and any additional top up required, in order to ensure that the total funding amount remains the same. Priority will be given to Elements 2 and 3, with the remainder being allocated to Element 1.

Schools will have flexibility to target this funding to support pupils with SEN / ALN where it is most needed but must ensure that provision meets the requirements of pupils’ statements of SEN.

Element 1: Simplified Proxy Indicators – providing a base level of funding for all schools

It is proposed that this element would account for around 35% - 40% of delegated SEN / ALN funding (excluding the ALNCo element) and distribution would be based on the following simplified proxy indicators:

Indicator	Weighting
Number of pupils on the SEN Register (from PLASC)	80%
Free School Meals (FSM) entitlement ²	20%

These data would be averaged over the most recent 3 years available to smooth the impact of changes from one year to another.

This funding will not be deducted from the “top up” funding as is currently the case.

² FSM is used as a proxy for deprivation and is widely used by Welsh Government for resource distribution. The group discussed using the Welsh Index of Multiple Deprivation (WIMD) but this was discounted as it is not considered suitable by WG’s Distribution Sub Group and the data is not readily available in Powys.

Element 2: Allocation based on the number of pupils in certain PLASC categories

It is proposed that an amount, equivalent to around 40% – 45% of delegated SEN / ALN funding (excluding ALNCo element) is delegated to schools based on the number of pupils recorded as a 3 or a 4 in either the Curriculum and Teaching or the Grouping and Support categories on PLASC (see Appendix B). This would ensure that funding is targeted at those pupils with the greatest need.

The Specialised Resources category will not be used, as the local authority already funds specialist equipment. The Advice and Assessment category will not be used, as there is not normally an associated cost.

Element 3: “Top up” funding

It is proposed that a relatively small amount of the funding be available (around 10% - 15% of delegated SEN / ALN funding excluding the ALNCo element) be available to top up the funding provided through Element 1 and Element 2 above where this funding is below what is needed to support schools in providing what is currently required by the statement, banding or IDPs in the future.

Question 1: Element 1: It is proposed that a base level of funding is distributed to each primary school based on simplified proxy indicators, 80% pupils on the SEN register / 20% FSM entitlement. How supportive are you of this proposal?

Please select only one item:

- Very supportive
- Supportive
- Neither supportive nor unsupportive
- Not supportive
- Not at all supportive

Question 2: Please explain the reasons for your response / add any comments so that we can consider this further

Question 3: Element 2: It is proposed that an amount is delegated to schools based on the number of pupils recorded as a 3 or a 4 in either the Curriculum and Teaching or the Grouping and Support categories on PLASC and that this

is the first call on the funding available. How supportive are you of this proposal?

Please select only one item:

- Very supportive
- Supportive
- Neither supportive nor unsupportive
- Not supportive
- Not at all supportive

Question 4: Please explain the reasons for your response / add any comments so that we can consider this further

Question 5: Element 3: It is proposed that a relatively small amount of the funding available (around 10% - 15% of delegated SEN / ALN funding excluding the ALNCo element) be available to top up the funding provided through Element 2 above where this funding is below what is needed to provide what is currently required by the statement or banding. How supportive are you of this proposal?

Please select only one item:

- Very supportive
- Supportive
- Neither supportive nor unsupportive
- Not supportive
- Not at all supportive

Question 6: Please explain the reasons for your response / add any comments so that we can consider this further

In order to ensure consistency between schools, it is proposed that a system of moderation will be introduced, involving ALNCoS and scrutiny of provision maps by LA officers.

Question 7: It is proposed that a system of moderation will be introduced, involving ALNCOs and scrutiny of provision maps by LA officers. How supportive are you of this proposal?

Please select only one item:

- Very supportive
- Supportive
- Neither supportive nor unsupportive
- Not supportive
- Not at all supportive

Question 8: Please explain the reasons for your response. Is there an alternative moderation process that you can suggest?

Funding for Specialist Centres and their Mainstream Schools

Current system

Specialist centres (excluding the pre-school assessment centres) are normally staffed by one teacher and one higher level teaching assistant fully funded by the local authority.

Where learners in a school that has a specialist centre have a higher level of need identified within a statement, additional funding is delegated to the school based on the banding “top up” system, regardless of whether those learners spend all or part of their time in the specialist centre.

The pupil numbers used in the funding formula for the mainstream school is reduced by the number of places available within the specialist centre. This can cause issues for some of these schools, e.g. if a school with a 12-place specialist centre has 100 pupils on roll in total, it receives its mainstream funding on the basis of 88 pupils, regardless of how many pupils actually attend the specialist centre.

Proposals for change

It is proposed that the mainstream school funding will be based on the number of pupils on roll who only attend the mainstream setting e.g. if the school has 100 pupils on roll, 4 of whom attend its 12-place specialist centre, the school receives its mainstream funding on the basis of 96 pupils.

It is also proposed that, going forward, local authority officers should meet with the headteacher and specialist centre teachers on an annual basis to agree on any additional requirements for the centre as a whole, for example to support integration into mainstream classes or where a learner or a cohort of learners have extremely complex needs. This will enable specialist centre teachers to use funding more flexibly to support all their learners.

Question 9: It is also proposed that the funding formula for the mainstream schools with specialist centres is based on pupils on roll that do not attend the specialist centre. How supportive are you of this proposal?

Please select only one item:

- Very supportive
- Supportive
- Neither supportive nor unsupportive
- Not supportive
- Not at all supportive

Question 10: Please explain the reasons for your response / add any comments so that we can consider this further

Question 11: It is proposed that, going forward, local authority officers should meet with the headteacher and specialist centre teachers on an annual basis to agree on any additional requirements. How supportive are you of this proposal?

Please select only one item:

- Very supportive
- Supportive
- Neither supportive nor unsupportive
- Not supportive
- Not at all supportive

Question 12: Please explain the reasons for your response / add any comments so that we can consider this further

A bit about your school

Question 13: Please could you state whether you are responding as a

- Primary school
- Secondary school
- Special school

Question 14: Name of school? (this is voluntary and you do not have to provide this information if you'd prefer not to).

Appendix A to Consultation Paper

Current Proxy indicators and weightings

Indicator	Weighting
Number of pupils across all primary schools	10%
Number of primary pupils not achieving the core subject indicator (CSI) at KS2	20%
Free School Meal (FSM) entitlement	20%
Number of primary pupils scoring under 75 on the Cognitive Abilities Tests (CATs) in year 4	5%
ALN weighted units relating to number of pupils on School Action Plus (SA+)	35%
WG reading test results in year 2 and year 4	10%

PLASC Categories

Every year, schools are required to enter information onto PLASC in relation to pupils with Special Educational Needs. This information indicates the type of support and provision that is required by individual pupils in terms of:

- Curriculum and teaching methods
- Grouping and Support
- Specialised resources
- Advice and Assessment

Criteria for the different types of provision are as follows:

Curriculum and teaching methods

To identify the provision of support for the pupil in curriculum and teaching methods.

- CT1 some targeted differentiation
- CT2 significant and targeted differentiation
- CT3 some curriculum modifications
- CT4 significant curriculum modifications

Grouping and support

To identify the provision of support for the pupil in grouping and support.

- GS1 occasional additional support in class
- GS2 targeted and sustained additional support
- GS3 small group class provision
- GS4 mostly small group provision

Specialised resources

To identify the provision of support for the pupil in specialised resources.

- SR1 periodic access to standard equipment
- SR2 individual access to normally available equipment
- SR3 individual access to specialised equipment
- SR4 dedicated access to highly specialised equipment

Advice and assessment

To identify the provision of support for the pupil in advice and assessment.

- AA1 school-based assessment
- AA2 external advice/assessment
- AA3 specialised assessments
- AA4 multi-agency assessments

Consultation Responses

There were 22 responses to the consultation in total, representing 9 primary schools and 5 secondary schools

A It is proposed that a base level of funding is distributed to each primary school based on **simplified proxy indicators**, 80% pupils on the SEN register / 20% FSM entitlement.

1. How supportive are you of this proposal?

Option	Total	Percent
Very supportive	0	0.00%
Supportive	5	22.73%
Neither supportive nor unsupportive	14	63.64%
Not supportive	3	13.64%
Not at all supportive	0	0.00%
Not Answered	0	0.00%

2. Please explain the reasons for your response / add any comments so that we can consider this further.

Responses from Consultees	Officer comments
Supportive - with clear guidance of placement on SEN register and with fair and consistent monitoring.	<p>The LA agrees that there is a need for guidance on the placing of pupils on the SEN/ALN register as well as fair and consistent moderation. Closer working between schools and the LA will ensure greater consistency across Powys. This will be particularly important as the ALN Act is implemented.</p> <p>We recognise the issues raised in relation to FSM. FSM figures would be taken as an average of the previous 3 years to help address this.</p>
Neither - We have evidence that there is a strong link between deprivation and SEN, but many of our pupils who were FSM a few years ago- and are still living in poverty- are no longer on the FSM register- often because parent/s will struggle and do anything other than apply and have to find transport to the job centre or divulge personal information.	
Not supportive - Pupils designated as eFSM is decided outside school control and the same guidelines are applies to all families. Pupils on the school's SEN register is open to variance across schools and could inflate the base level of funding.	

<p>4 x Neither - On the one hand, there is a proven link between ALN and deprivation (best measured through FSM). Also, by including pupils on the SEN register, we would hopefully ensure schools with greatest ALN needs receive more funding. However, by linking funding to the SEN register, we introduce a perverse incentive to increase the number of pupils on the SEN register.</p>	<p>Issues relating to delegated ALN funding for secondary schools will be addressed next year as part of a full review of secondary ALN funding.</p> <p>Issues raised in relation to the assessment and statementing process will be considered by Inclusion officers. Prompt assessment of need and early intervention are a key part of the ALN strategy.</p>
<p>Not supportive - eFSM is funded through PDG. Monies made available to schools through the finding formula for ALN must be for ALN.</p> <p>eFSM can vary significantly from year to year.</p>	
<p>Supportive - I wonder whether the levels of SEN would be considered and how this would work with the new IDPs. For example, a child on a statement or in many situations on School Action Plus (SAP) requires more funding than a School Action (SA) pupil, especially pupils with behavioural challenges. Would it also take into consideration new pupils entering the school?</p>	
<p>Neither - What about funding to High Schools. We currently do not have the support needed for the high number of pupils who have ALN needs and who receive no support at High School. High Schools should receive the equivalent funding to ensure these pupils receive the support they need at High School. Also why are pupils who quite evidently need a statement, not being assessed and given a statement? Why when pupils are statemented are they not then given the support they should have to ensure their needs are met? Why does assessment by county take so long? Why is it only the pupils of parents who 'shout the loudest' that are listened to?</p>	

B It is proposed that an amount is delegated to schools based on the number of pupils recorded as a 3 or a 4 in either the Curriculum and Teaching or the Grouping and Support categories on **PLASC** and that this is the first call on the funding available.

3. How supportive are you of this proposal?

Option	Total	Percent
Very supportive	1	4.55%
Supportive	7	31.82%
Neither supportive nor unsupportive	13	59.09%
Not supportive	1	4.55%
Not at all supportive	0	0.00%
Not Answered	0	0.00%

4. Please explain the reasons for your response / add any comments so that we can consider this further.

Responses from Consultees	Officer comments
<p>This depends on who gets to decide what grouping and support category they should be in. Experience tells me that some county officers do not accept what schools tell them about the high level of support some pupils need.</p>	<p>One of the responses suggests a lack of trust between the school and the LA. This is something that officers are working hard to address. It is crucial that schools and LA officers have a shared understanding of the needs of pupils and the different types of support that should be provided.</p> <p>Guidance on the PLASC categories is crucial. Currently there is a lack of consistency in relation to the PLASC information entered by schools. For this reason, it is now recommended that the PLASC element of this proposal should be implemented in 2022, giving officers time to work with schools to ensure consistency.</p>
<p>Funding for higher needs, including children with statements/EHCPs must come first. Presently, schools with higher needs are in fact penalised; their delegated budget for ALN, including allocations for an ALNCO, can be used up entirely on one:one support. This does not allow schools to meet the needs of all children with ALN equally, which POWYS' current formula apparently aims to do- it doesn't. How can schools with higher levels of need be worse off? These are the schools that cannot use the ALNCO element to fund an ALNCO! The current way ALN is funded is fundamentally flawed and needs changing.</p>	

<p>This would answer my questions above as long as schools are consistently using the PLASC codes above. We many need some clear criteria on each of the codes to ensure fairness and consistency.</p>	<p>We fully agree that schools who have pupils with higher needs should not be penalised. The suggested model aims to address this.</p>
<p>Schools should be able to operate on an individual basis, their judgement be trusted and schools should be able to say what funding they need and county respond accordingly. Education should be devolved form county so that schools can operate their own budget without money being taken by county for a tier of operators that are not needed.</p>	
<p>Schools need money for students though in rural areas this is tough.</p>	

- C** It is proposed that a relatively small amount of the funding available (around 10% - 15% of delegated SEN / ALN funding excluding the ALNCo element) be available to **top up** the funding provided through Element 2 above where this funding is below what is needed to provide what is currently required by the statement or banding.

5. How supportive are you of this proposal?

Option	Total	Percent
Very supportive	1	4.55%
Supportive	6	27.27%
Neither supportive nor unsupportive	13	59.09%
Not supportive	2	9.09%
Not at all supportive	0	0.00%
Not Answered	0	0.00%

6. Please explain the reasons for your response / add any comments so that we can consider this further.

Responses from Consultees	Officer comments
<p>This would allow some top up where provision needed is specialised or new to a setting.</p>	<p>We agree that schools who have pupils with statements should be provided with sufficient funding to</p>

<p>Powys' funding formula must not penalise schools that provide the support outlined in a statement. Funding must be available to schools for the required support outlined in statements. Currently, the formula is not fair to schools with higher levels of need.</p>	<p>address the needs identified in the statement.</p> <p>There will be an expectation that, where possible, support will be shared in order to avoid over-dependence on adult support and to make efficient use of the whole pot of funding across Powys.</p>
<p>I agree schools often need top up funding and this needs to be easily accessible if they are unable to meet a child's needs.</p>	
<p>Schools should be able to be in charge of their own budget and allocate funding appropriately.</p>	
<p>I have concerns over how it will be determined if current requirements are not being met. Will this be fair? Will the process be the same for all schools?</p>	

D It is proposed that a system of **moderation** will be introduced, involving ALNCos and scrutiny of provision maps by LA officers.

7. How supportive are you of this proposal?

Option	Total	Percent
Very supportive	4	18.18%
Supportive	2	9.09%
Neither supportive not unsupportive	14	63.64%
Not supportive	1	4.55%
Not at all supportive	1	4.55%
Not Answered	0	0.00%

8. Please explain the reasons for your response / add any comments so that we can consider this further.

Responses from Consultees	Officer comments
<p>This would help my concerns with question one but I think clear guidance on provision mapping is needed from County but that is also flexible and considerate to different approaches. My experience has been a list of interventions with monitoring progress on these, where as due to being a small school we work our interventions in different ways but this was not seen as acceptable even though progress was evident.</p>	<p>It is encouraging that there is general support for increased moderation in order to ensure consistency. Inclusion officers will be working with schools this year on provision mapping.</p>
<p>This depends on how positive the moderation process turns out to be. If meetings simply become an argument about the support a child needs- and county officers, who hardly ever step foot in a setting to see actual children, have the final say, then no- I don't agree.</p>	<p>It is acknowledged that there have been weaknesses in support in ALN over recent years. The new ALN strategy requires a highly trained workforce in schools and a small number of very specialist staff working for the LA.</p>
<p>This would ensure more consistency across schools.</p>	<p>It is recognised that, over recent years, officers have not spent enough time in schools. This is largely due to the fact that the central team is currently very small.</p>
<p>Previously, there was a system of moderation involving ALNCOs and scrutiny of provision maps by LA officers. This was very supportive and helped the ALNCOs to solve problems and identify ways forward. I look forward to this being reintroduced.</p>	<p>Additional officers are currently being appointed, following a restructure of the service. A key priority will be for officers to spend more time in schools, working with headteachers and ALNCOs.</p>
<p>Until Powys funds qualified ALNCOs, this must not be the case. Often, due to poor funding, headteachers have to take on this role. This is unacceptable- most heads are not qualified and already have huge workloads.</p> <p>The county has got rid of the best support mechanism (LIST) where we worked together and felt supported. This is not the case now. I would not welcome 'moderation' of provision maps in this school. I would, however, welcome support!</p> <p>Such a move would have a negative impact on the mental health and well being of those heads who have to cover this role.</p> <p>Facilitate the employment of qualified ALNCOs before introducing such scrutiny.</p>	<p>Schools receive a small amount of funding to support the work of the ALNCO. However, it is expected that the salary of the ALNCO is met within the overall school budget. Schools may wish to consider the appointment of cluster ALNCOs. ALNCO training will be a priority over the coming years.</p>

I feel this needs doing to ensure all children are having their needs met as long as this is done in a supportive way and not a judgemental way. Schools would also need to ensure ALNCOs are given enough time to complete this effectively.	
We don't need LA officers, we need more teachers and support in school to ensure that pupils receive the education and support they need. The salary of an LA officer will pay for teaching staff and LSA's that are needed in the classroom instead of schools operating on ridiculously small budgets to provide ALN support.	
Training of ALNCOs in putting together provision maps will be necessary to make sure there is parity in the method across all schools.	

9. If you have any further comments that you'd like to make about the funding formula please use this space to give them.

Responses from Consultees	Officer comments
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- E** It is also proposed that the funding formula for the **mainstream schools with specialist centres** is based on pupils on roll that do not attend the specialist centre. How supportive are you of this proposal?

10. How supportive are you of this proposal?

Option	Total	Percent
Very supportive	1	4.55%
Supportive	2	9.09%
Neither supportive nor unsupportive	1	4.55%
Not supportive	3	13.64%
Not at all supportive	14	63.64%
Not applicable	0	0.00%
Not Answered	1	4.55%

11. Please explain the reasons for your response / add any comments so that we can consider this further.

Responses from Consultees	Officer comments
<p>I would presume monitoring of the units would take place as if a low number of places are being accessed then is the unit viable especially with high level of staffing. I think a mid way point would have been better. Actual students - 50% of unit if higher than this then the formula above would work. I do realise the valuable work these units do but they are not consistent across the county and give additional resources to a select group of schools.</p>	<p>LA officers want to work with schools where there are specialist centres to ensure that the staffing of these centres is appropriate. Where relevant, this may include additional funding to support pupils with a very high level of need as well as pupils who are integrating into mainstream classes.</p> <p>The School Funding (Wales) regulations require the authority to reduce the pupil numbers by the number of pupils in places which the authority recognise as reserved for children with special educational needs.</p> <p>Basing the reduction on the actual numbers of pupils attending the specialist centres is the most transparent methodology.</p> <p>This will also support the implementation of the ALN strategy of ensuring that learners are placed in the most appropriate setting for their needs</p>
<p>Pupils in Specialist Centres are also members of their mainstream school. In order to integrate them effectively, and to avoid non-centre pupils from losing out on their provision, other school staff must be involved and staff ratios- in the mainstream classrooms, at play and lunchtime- have to be higher.</p>	
<p>This proposal recognises a previously unchallenged discrepancy.</p>	
<p>I strongly disagree with the proposal that funding of pupils in schools with a specialist centre will be based on the number of pupils on roll who only attend the mainstream setting e.g. if the school has 100 pupils on roll, 4 of whom attend its 12-place specialist centre, the school receives its mainstream funding on the basis of 96 pupils.</p> <p>This proposal will systematically penalise mainstream schools for housing their specialist centre and fails to take into account how specialist centres function.</p> <p>For example, in Llanidloes Primary School, all pupils who attend the KS2 specialist centre are supported in order to reintegrate them as much as possible back into mainstream classes. This is an important part of their progression towards independence. When they are reintegrated into mainstream lessons, they add to the total number of pupils in that mainstream class. This can incur significant additional</p>	

costs including teaching and non-teaching staff. For this reason, all pupils in schools like Llanidloes, including those who attend the specialist centre, need to be included in the total pupil calculation in block 1 of the funding formula. There is simply no sound, fair rationale for failing to do so.

By deducting pupils from the class size calculations, the LA fails to take into account how specialist centre provision works in practice (with pupils moving in and out of the centre according to each child's progress towards resilience). This would financially penalise schools that have specialist centres on site. It leads to a reduction of funding for these schools despite the fact that they have to increase support staff costs (without any additional funding at all in the current formula) to support specialist centre pupils' access to mainstream classes. Neither does it take into account the extra midday supervision often needed for pupils with additional needs.

The proposal to continue this practice of pupil deductions is patently about reducing overall ALN expenditure and is grossly unfair

As previously.
This proposal will systematically penalise mainstream schools for housing a specialist centre and fails to take into account how specialist centres function.

Less money for rest of school, despite having to meet the needs of children in specialist centre, is not right. These children require greater support when they are integrated back into class. Very few children are full time in the specialist centre.

Current formula can also affect a head's pay.

I feel I cannot comment on this as I do not have experience of a setting like this and am unsure of the best approach.

5 x I strongly disagree with this proposal which is grossly unfair.

This proposal will systematically penalise mainstream schools for housing a specialist centre and fails to take into account how specialist centres function.

For example, in Llanidloes High School, all ASD pupils who attend the specialist centre are supported in order to reintegrate them as much as possible back into mainstream classes. This is an important part of their progression towards independence. When they are reintegrated into mainstream lessons, they add to the total number of pupils in that mainstream class. This can incur significant additional costs for an extra class teacher. For this reason, all pupils in schools like Llanidloes, including those who attend the ASD Centre, need to be included in the total pupil calculation in block 1 of the funding formula. There is simply no sound, fair rationale for failing to do so.

By deducting pupils from the class size calculations, the LA fails to take into account how specialist centre provision works in practice (with pupils moving in and out of the centre according to each child's progress towards resilience). This would financially penalise schools that have specialist centres on site. It leads to a reduction of funding for these schools despite the fact that they have to increase support staff costs (without any additional funding at all in the current formula) to support ASD Centre pupils' access to mainstream classes to as great an extent as they can manage.

The proposal to continue this practice of pupil deductions is patently about reducing overall ALN expenditure as it is grossly unfair.

Why not count all pupils instead of penny pinching. No wonder you're in special measures.

Because this is deeply unfair.	
Specialist units need to be supported to deliver the education along with the school. Many specialist units try to support pupils who county are delaying in statementing or who have misdiagnosed but clearly need support. The support units are not a separate entity to the school they are integral to it and the mainstream school and special units work together to support one another. Often pupils who are not statemented but who clearly need a statement have no support form Powys CC and need to be supported by the mainstream school with no additional resources.	
These units cover a large area so may not be correlated to pupils on rule.	
Most pupils in specialist centres attend normal lessons	

F It is proposed that, going forward, local authority officers should **meet with the headteacher and specialist centre** teachers on an annual basis to agree on any additional requirements.

12. How supportive are you of this proposal?

Option	Total	Percent
Very supportive	9	40.91%
Supportive	5	22.73%
Neither supportive nor unsupportive	7	31.82%
Not supportive	0	0.00%
Not at all supportive	0	0.00%
Not Answered	1	4.55%

13. Please explain the reasons for your response / add any comments so that we can consider this further.

Responses from Consultees	Officer comments
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<p>The units need to be supported by the county even though this does sound like an option for more resources whereas I think it should work both ways ie reduction of resources.</p>	<p>The aim of this proposal is to develop closer working between local authority specialists and each of the specialist centres.</p>
<p>How can county possibly understand the requirements of specialist centres without having regular meetings?</p>	<p>Once the new Inclusion structure is in place, regular meetings will be held with specialist school</p>
<p>While it is clearly desirable to establish strong communication between the LA and schools with specialist centres, if this is a half-hearted attempt at trying to address the patently unfair practice of reducing specialist centre pupil numbers from block 1 funding, then I am against the idea. Rather, the LA needs to end the unfair practice of deducting pupils from school rolls.</p> <p>To repeat, this practice is unfair because it systematically penalises mainstream schools for housing a specialist centre and fails to take into account how specialist centres function.</p>	<p>headteachers and teachers at the school. Every specialist centre is different, and the staffing needs vary according to pupil need, number of pupils, age range and language.</p> <p>If a pupil is spending considerable time in mainstream, consideration needs to be made as to whether placement at the specialist centre is still needed.</p>
<p>ALN team need to be supporting specialist centres at all times - they need to know settings and challenges. This can only be accomplished if they go into the centres.</p> <p>Needs to be clear 'line management' and staff need to feel that they have the support from line managers.</p>	<p>Issues raised in relation to pupil numbers has been addressed above.</p>
<p>Meetings with the LA are always beneficial to raise strengths and issues.</p>	
<p>Headteachers know the needs of the school.</p>	
<p>While it is clearly desirable to establish strong communication between the LA and schools with specialist centres, if this is a half-hearted attempt at trying to address the patently unfair practice of reducing specialist centre pupil numbers from block 1 funding, then I am against the idea. Rather, the LA needs to end the unfair practice of deducting pupils from school rolls.</p>	

2 x While it is clearly desirable to establish strong communication between the LA and schools with specialist centres, if this is a half-hearted attempt at trying to address the patent unfairness inherent in reducing specialist centre pupil numbers from block 1 funding, then I am against the idea. Rather, the LA needs to end the unfair practice of deducting pupils from school rolls.

To repeat, this practice is unfair because it systematically penalises mainstream schools for housing a specialist centre and fails to take into account how specialist centres function.

For example, in Llanidloes High School, all ASD pupils who attend the specialist centre are supported in order to reintegrate them as much as possible back into mainstream classes. This is an important part of their progression towards independence. When they are reintegrated into mainstream lessons, they add to the total number of pupils in that mainstream class. This can incur significant additional costs for an extra class teacher. For this reason, all pupils in schools like Llanidloes, including those who attend the ASD Centre, need to be included in the total pupil calculation in block 1 of the funding formula. There is simply no sound, fair rationale for failing to do so.

By deducting pupils from the class size calculations, the LA fails to take into account how specialist centre provision works in practice (with pupils moving in and out of the centre according to each child's progress towards resilience). This would financially penalise schools that have specialist centres on site. It leads to a reduction of funding for these schools despite the fact that they have to increase support staff costs (without any additional funding at all in the current formula) to support ASD Centre pupils' access to mainstream classes to as great an extent as they can manage.

The proposal to continue this practice of pupil deductions is patently about reducing

overall ALN expenditure as it is grossly unfair.	
To ensure the needs of schools are met.	
I have concerns over ensuring the parity of this between schools given the diverse range of ALN learners that there can be.	

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CYNGOR SIR POWYS COUNTY COUNCIL.**CABINET EXECUTIVE
15th December 2020**

REPORT AUTHOR: County Councillor Myfanwy Alexander, Portfolio Holder for Adult Social Care
County Councillor Rachel Powell, Portfolio Holder for Young People and Culture
County Councillor Graham Breeze, Portfolio Holder for Corporate Governance, Engagement and Regulatory Services
County Councillor Phyl Davies, Portfolio Holder for Education and Property

REPORT TITLE: Regional Partnership Board Health and Care Academy

REPORT FOR: Decision

1. Purpose

1.1 The purpose of this paper is to provide Cabinet with an update on the development of the Regional Partnership Board (RPB) Health and Care Academy, which is a core part of Workforce Futures Strategic Framework. The Cabinet is asked to approve the Health and Care Academy Blueprint document, and acknowledge the work underway to develop the initial physical space as part of the development of the Academy.

2. Background

2.1 In March 2020, the Workforce Futures Strategic Framework was launched. Within the strategic framework there was agreement across the RPB to develop a Health and Care Academy. This work will feed into the wider Rural Academy of learning, led by the Education Transformation team at Powys County Council.

At this time the Workforce Futures Programme was allocated additional ICF capital funding to develop the first Health and Care Academy physical space at Bronllys. As a result of the COVID pandemic, this work was put on hold between April and June 2020. Workforce Futures resumed its work in July 2020 and the development of the Health and Care Academy along with the initial physical space was re-established. This partnership work has been led by a steering group, chaired by the Chief Executive of the Health Board in her role as Chair of the RPB.

2.2 The Health and Care Academy blueprint

The Health and Care Academy blueprint has been developed, overseen and led by a Steering group made up of partners from across the RPB including representation from Powys County Council. The blueprint outlines the:

- Strategic Context
- Current position and provision
- Gaps and opportunities
- Health and Care Academy proposal and the ambition
- Outline of Schools approach
- How we will work in Partnership to deliver the ambition
- Measurable outcomes
- Implementation considerations

A copy of the blueprint can be found in the Appendix 1.

3. Advice

3.1 The ambition of the Health and Care Academy is to deliver a truly integrated education, training and development model across the sector. This will be provided in county and will focus on direct care, shared care and care delivered digitally. This approach will also support the Welsh Language Active offer.

Developed with Partners as part of Health and Care Strategy; A Healthy, Caring Powys, the Health and Care Academy Model was a concept articulated in the Workforce Futures Strategic Framework agreed by all partners in 2019, and which described the need for this model in Powys. It is also part of a Wales-wide response to increase local access to education, training and development across the health and social care sector, specifically focused on the workforce in Powys.

The ambition is clear, activating the Health and Care Academy Model will support the Health and Care Sector in Powys to become the sector of choice, by growing the workforce through local training and education, skills development and leadership. The sector will become an exemplar provider of rural professional and clinical education through state of the art physical and virtual spaces, combined with a Leadership and management talent operating at all levels and across systems. Leaders from across Public sector in Wales will come to Powys to work alongside local leaders to learn about Digital Transformation. This will enable leaders to develop innovative models of care in a rural setting through technology, education, research and innovation, making sure the health and care workforce including our volunteers and carers can respond to people's needs in a timely way.

The proposed Health and Care Academy model has been developed with partners across the sector through the Steering group, working closely to design a blueprint fit for the future. The concept of operating as a hub and spoke model across many sites in the county, offers a practical solution to the geographical footprint in Powys. It will offer state of the art practical, academic and digital learning opportunities for staff, volunteers and carers, with a

longer-term vision of opening its doors to communities. As the model matures, spoke sites will start to champion areas of learning.

It will not only support local achievement of the aspirational health and care outcomes for the communities in Powys through in-service skills development, education and learning, as stated in the Health and Care Strategy; A healthy Caring Powys, but will have a significant impact on the economy of Powys and Wales, by supporting improvements in employment opportunities. The work will run parallel with the Education Transformation programme for Powys, where there will be a better support mechanism for the 16 plus offer. This will involve working closely with the 16 plus education providers.

By 2027, the Health and Care Academy sets out the ambition to:

- Be an **exemplar provider of rural professional and clinical education**, by delivering an integrated in-service training offer that focuses on direct care, shared care and care delivered through digital;
- Being the **sector of choice** by growing the health and care workforce through skills development, education and local training, whilst supporting the Welsh Language Active offer;
- Have a **Leadership talent, that operates at all levels** compassionately working across systems to make a difference to the citizens and communities of Powys and empowering their teams to do so;
- Make sure the **workforce is able to respond to people's needs** in a timely way, including our volunteers and paid and unpaid carers, through skills development, education opportunities;
- Be recognised as a **centre of excellence for research**, development and innovation within Wales, through trial and testing techniques; that includes a well-established industry relationship, that supports our core economy.

The structure of the Academy will be built upon four conceptual schools, including the school of:

- Professional and clinical education and training
- Research, development and innovation
- Volunteers and Carers
- Leadership

Each school will offer a collaborative portfolio of specialism underpinned by research, development, innovation and strong leadership.

To activate the work at pace, within the blueprint there is a series of actions and measurable outcomes planned for the short and medium term.

The Health and Care Academy blueprint is currently being discussed and approved across the RPB partners in Powys with an intended final approval at the middle of December, 2020.

3.2 Initial Physical Space

As the ICF capital funding envelop has a restricted deadline, work commenced to start the building works on Basil Webb, Bronllys in September, 2020. It is our intention that the opening of this initial space will be in April, 2021. Architects and construction companies have been sourced and work is underway at pace.

Operating as a hub and spoke model, other sites and spaces will come on line over the next couple of years, with a specific second focus in the Newtown area as part of the North Powys Wellbeing programme.

4. Resource Implications

There current resource ICF funding envelop covers just the strategic oversight of the programme of work through a joint health and care strategic workforce planning manager, and a programme support officer. Further additional funding outside of ICF has been secured by Powys Teaching Health Board to fund a Health and Care Business manager for the next 6 months.

The current capital ICF funding envelop just covers the building works of the initial physical space, and the programme team are currently sourcing other funding envelops to support the large digital infrastructure and furnishing costs. Some applications to charitable funds and others to further Welsh Government funding envelops i.e. Individual Learning Academies and research grants i.e. life sciences.

5. Legal implications

This work has been undertaken in partnership through the RPB, and within the ambition articulated in the joint Health and Care Strategy for Powys, where by Powys Teaching Health Board, Powys County Council and PAVO are key partners.

6. Data Protection

NA

7. Comment from local member(s)

None received to date

8. Integrated Impact Assessment

NA

9. Recommendation

The Cabinet is asked to approve the Health and Care Academy Blueprint document, and acknowledge the work underway to develop the initial physical space as part of the development of the longer term vision of the Academy.

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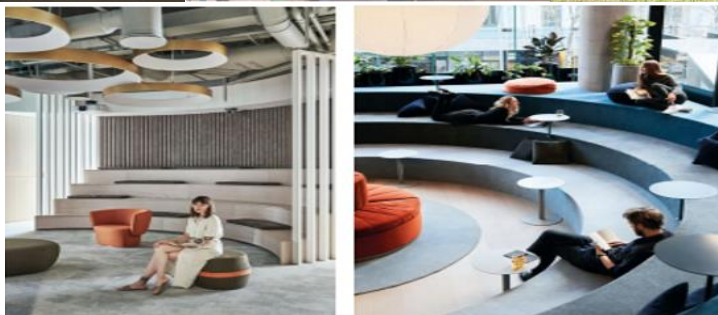
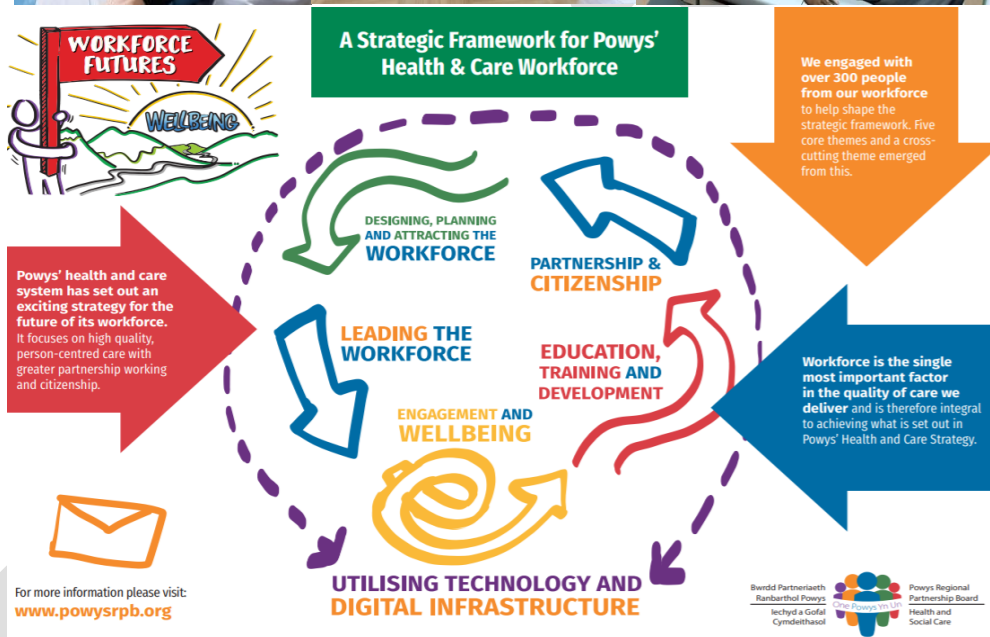
Email: louise.k.richards@wales.nhs.uk

Head of Service:

Corporate Director: Alison Bulman – Director of Social Services

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POWYS HEALTH AND CARE ACADEMY: Blueprint for The Future



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1. INTRODUCTION

The Powys Regional Partnership Board (RPB), incorporating the member organisations of Powys Teaching Health Board, Powys County Council and Powys Association of Voluntary Organisations, developed an integrated health and care strategy, 'A Healthy Caring Powys' for 2017-2027. As part of this strategy in January 2020, a Workforce Future Strategic Framework was agreed to take forward key enabling developments in implementing the strategy. This document outlines the collective vision and ambition for the future of Education, Training and Development across health and care, in the form of a Health and Care Academy. It describes a blueprint of a Health and Care Academy Model that will be truly integrated, and core to the delivery of the in-service education, training and development across the county that focuses on direct care, shared care and care delivered through digital, embracing the Welsh language.

Developed with Partners, the Health and Care Academy Model was a concept articulated in the Workforce Futures Strategic Framework and described the need for this model in Powys. It is also part of a Wales-wide response to increase local access to education, training and development across the health and social care sector, specifically focused on the workforce in Powys.

The ambition is clear; activating the Health and Care Academy Model will support the health and care sector in Powys to become the sector of choice, by growing the workforce through local training and education, skills development and leadership. The sector will become an exemplar provider of rural professional and clinical education through modern physical and virtual spaces, combined with a leadership and management talent operating at all levels and across systems. This will enable leaders to develop innovative models of care in a rural setting through technology, education, research and innovation, making sure the health and care workforce including our volunteers and carers can respond to people's needs in a timely way.

The proposed Health and Care Academy model has been developed with partners across the sector through an Executive Steering group, working closely to design a blueprint fit for the future. The concept of operating as a hub and spoke model across the county, offer a practical solution to the geographical footprint in Powys. It will offer modern, practical, academic and digital learning opportunities for staff, volunteers and carers. It will support local achievement of the aspirational health and care outcomes for the communities in Powys through in-service skills development, education and learning, and will have an important impact on the economy of Powys and Wales, by supporting improvements in employment opportunities. The work will connect with the Education Transformation programme for Powys, where there will be improved support for the 16+ Further and Higher Education.

2. STRATEGIC CONTEXT

2.1 National Context

In June 2018, the Welsh Government published 'A Healthier Wales: Our Plan for Health and Social Care'. The ambition of A Healthier Wales is for seamless health and social care, to help people live well in their communities, provide more services closer to or at

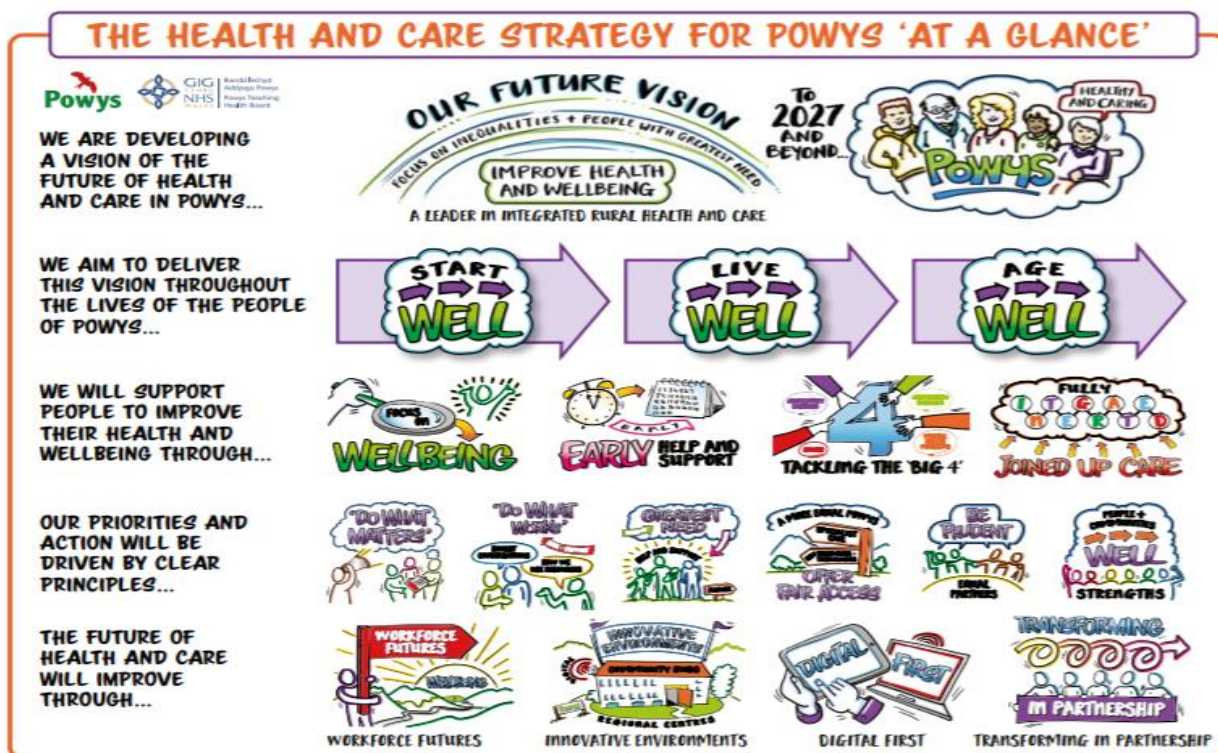
home, so that people only need to use a hospital for treatment that cannot be provided safely anywhere else. The strategy commits to investing in staff through training and development, providing them with the tools, systems and environment to work safely and effectively. Additionally, the Quadruple Aim of 'A Healthier Wales' demonstrates a commitment to both improving leadership and creating high value health and social care through rapid improvement and innovation, enabled data and a focus on outcomes. Part of this is the desire to use technology where possible to create high quality sustainable services, specifically trying to move to a more preventative offer and allowing people to manage their own health.

In the Autumn 2020, Welsh Government launched the National Workforce Strategy which sets out the vision, ambition and approaches that are needed to put wellbeing at the heart of the plans for the workforce. This strategy, developed by Health Education Improvement Wales (HEIW) and Social Care Wales (SCW) in partnership across Wales seeks to develop an inclusive, engaged, sustainable, flexible and responsive workforce in health and social care.

2.2 'A Healthy, Caring Powys'

'A Healthy, Caring Powys' (2017-27), was the first integrated regional Health and Care strategy in Wales. Developed with the people of Powys, it promotes a more holistic way of supporting the health and care needs of communities, with organisations and citizens and communities working together more effectively.

Figure 1: 'A Healthy, Caring Powys': Strategy on a Page



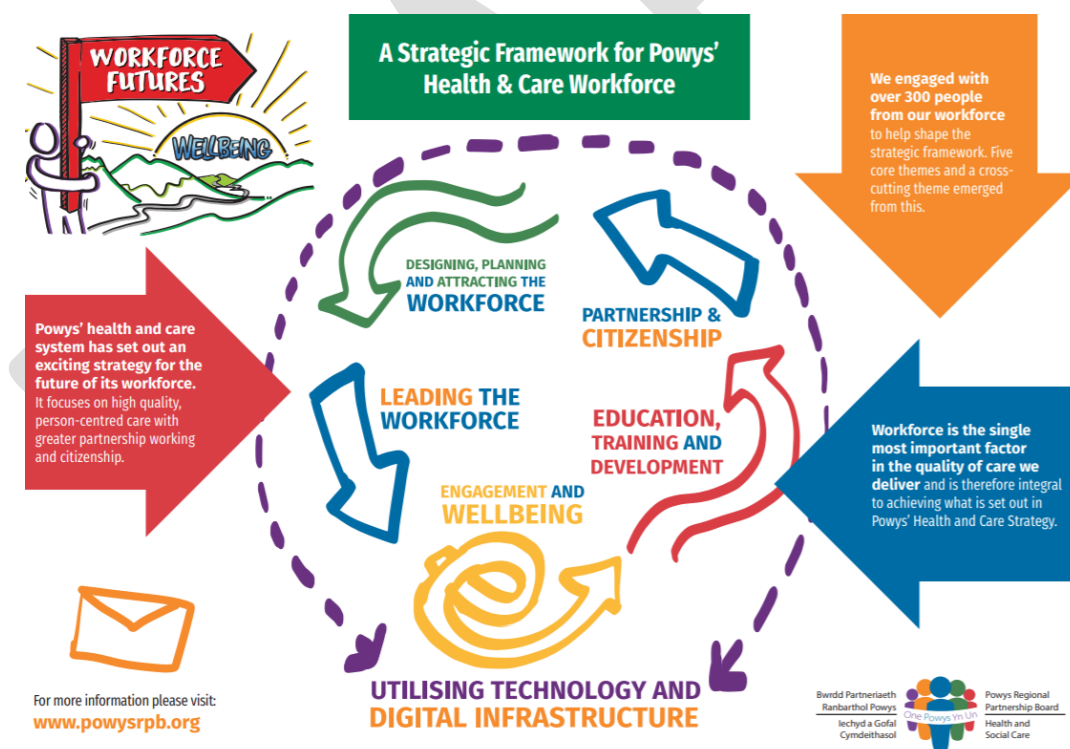
Partners in Powys are conscious of the undoubtedly challenging times ahead, particularly with prolonged austerity, the demographic changes in Powys and the impact of the

COVID-19 Pandemic. There is a compelling need to work differently if services are to be transformed for the future. Key Strategic Frameworks including 'Workforce Futures', 'Digital First', and 'Innovative Environments' act as key enablers in achieving the vision and transforming services. Delivery of the Health and Care Strategy will be critical to improving the social, health, economic, environmental and cultural well-being of Wales as part of Powys's longer-term Wellbeing Plan.

2.3 Workforce Futures Strategic Framework

As a key enabler for the 'A Healthy, Caring Powys', the Framework is designed to enable a strong, cross sector workforce, delivering our aim to improve health and wellbeing with and for the people of Powys. A wide range of individuals and organisations who are part of, and have an interest in the health and care workforce across Powys, helped to influence this Strategic Framework, focusing on 'what matters most' and the priorities for development. Over 300 people contributed to its development including partners, paid staff, carers and volunteers.

Figure 2: Workforce Futures Strategic Framework: Summary



The Framework sets out the high-level strategic priorities to deliver A Healthy, Caring Powys through the workforce and is based on needs, evidence and the views of people gained through engagement. To achieve the ambition, a workforce model that is designed to deliver new models of care, values the contribution of everyone and supports access to high-quality education, learning and development is key. The framework describes the key themes:

- Designing, Planning and Attracting the Workforce
- Leading the Workforce
- Engagement and Wellbeing
- Education, Training and Development
- Partnership and Citizenship
- Cross-cutting theme: Technology and Digital Infrastructure

The Workforce Futures Strategic Framework articulates the commitment to develop a Health and Care Academy. This describes the need to have:

- An approach where the growth of leadership and skills responsive to local need can thrive;
- A multi-agency workforce where people learn and develop together to meet the needs of a rural county and provide seamless health and care services;
- A reputation as a leading provider of health and care education, training and development and is seen as a first-choice employer;
- A flexible workforce making the most of resources, including digital technology, through having the right person with the right skills in the right place at the right time;
- Volunteers and unpaid carers who are recognised and supported as key members of the 'workforce';
- Clinical and professional leadership teams who have more capacity and capability;
- A commitment that increasingly delivers learning and development in the Welsh Language.

It also describes its alignment to other strategic frameworks that enable the Health and Care Strategy to be delivered.

Key Enablers

Utilising the four key enablers of the Health and Care Strategy, provides the foundation on which health and care education, training and development in Powys can develop. The key enablers provide critical support to deliver services, resources, relationships and infrastructure.

Aligned to **Digital First** - An infrastructure support that enables the development of a future proof Health and Care Academy, by supporting the following:

- A stronger infrastructure, providing a platform for learning and education through digital media, tools and technology;
- Information sharing protocols and IT solutions which improve communication and enable agile joint working;
- A workforce that has the skills and knowledge to operate a single health and social care record accessible across agencies;
- Digitally enabled environments that support the workforce to increase the use of digital applications such as health checks, monitors, the e-market place, software for remote consultations and diagnostics, risk stratification tools and artificial intelligence.

Aligned to **Innovative Environments** - The environmental offer that enables an attractive location for educational providers, learners and the wider workforce, by creating the following:

- An innovative built environment, helping agencies to work together to provide care closer to home, learning in state-of-the-art simulation suites and virtual learning;
- Generic and flexible spaces that support agile learning and working;
- Assets that are shared across partners;
- Buildings that are digitally enabled and designed to support wellbeing;

Aligned to **Transforming in Partnership** - A partnership that comes together to lead and activate the future of health and care education, training and development in Powys through:

- Integrated, evidenced-based educational and skills development pathways which are used across multi-agencies and/or multi-disciplinary teams;
- Strategic partnerships that support the delivery of the Health and Care Academy Model;
- Better understanding of the voluntary, third sector and social enterprises requirements to enable more support in the delivery of health and social care services;
- Creating and learning from research, development and innovation that enables better health and care;
- Commissioning and networking integration between primary, community and secondary care services;
- Developing stronger Industry relationships working collectively to support wellbeing.

3. CURRENT POSITION

Overall, Powys is faced with significant workforce challenges, some of which are specific to the county, and some are common on a national level. Common national challenges include shortages in several professions, such as social care workers (particularly in children's services), nurses and doctors, which are likely to persist for some time to come, with some services relying heavily on agency staff e.g. medics, nursing and social workers. Other challenge areas include the domiciliary carer workforce. In social care the current picture of the Welsh legislation and social care registration requirements, now diverging from English requirements, is reducing fluidity across the Wales/England border and thereby increasing the urgency of 'growing our own' social care staff, and retaining them.

Locally, many people working in health and care services are due to retire soon. Although this will not tell the whole story of future staffing level predictions, it is a concerning factor and one that needs consideration in the planned delivery of professional and clinical education, training and learning locally. 65% of unpaid carers are over 50 and 39% are retired. Their health is typically below average, and some carers are now providing more than 50 hours of care each week. Unpaid carers are more prevalent in the south of Powys, particularly around the Ystradgynlais area. The number of unpaid

carers is expected to increase over the coming years due to the increasing ageing population. The number of young carers is also increasing, with most providing up to 19 hours of care. Some young carers, due to their responsibilities, are at risk of missing out on school time, affecting their education and future prospects.

Evidence suggests that a large proportion of the working-age population access education, learning and development outside of county, given there is no 'brick university' within the foot print of Powys, with approximately 500 students each year going out of county to access higher level educational opportunities, equating to £2 million worth of educational funding moving to neighbouring counties and across the border into England.

Population changes mean there may be more older people and fewer younger people living in Powys in the future, and whilst people are living longer, these years are not always healthy. To meet future demand, there has to be a change in the way services are delivered and how the workforce is secured and developed, so that both are affordable and sustainable.

Positively, developments in technology are changing how some health and care services and support are provided. For example, more people can access services in or closer to home, and the workforce is acquiring the ability to operate in a new digital world, supporting more of the communities to receive health and care services in this way. Enabling leaders across the sector are aware of the latest thinking and digital advancements and able to drive forward improvements based on sound research.

There is a strong commitment and contribution from our third sector providers to health and care in Powys. Maintaining, however, the right levels of care delivered in a different way, requires improvements in how volunteers and carers are supported including skills development and ongoing support.

3.1 Current education, training and development provision

There is a strong commitment in Powys to invest in the skills and development of the workforce. Across Health, Social Care, General Practice and Third Sector, there are a range of in-service development opportunities, these span across:

- Statutory & Mandatory training
- Role Mandatory training
- Leadership Training
- CPD training
- Professional and Clinical training

There are in the region of over 200 different types of development opportunities. There is also support for the workforce to access a range of commissioned training, provided by external providers. Some of our commissioned training is delivered locally, and some is delivered outside of county. There is an investment to capitalise on the national Continuing Professional Development offers for the workforce i.e. Health Education and Improvement Wales & Social Care Wales and Academi Wales initiatives.

On average a professional/clinician will spend 18.5 days annually undertaking CPD*. Other healthcare supporting roles spend on average 1.5 days annually undertaking statutory and mandatory training**.

The current education, training and development model satisfies the immediate need, however, will not be fit for purpose in the future. There is a heavy investment across partners in education, learning and development, which is resource intense and often provided within silos. There is currently no central/combined coordination of the wide learning offer, which sometimes results in duplication across the system. Individual organisations design and manage organisational and professional specific training, however modern training space is sparse, with organisations outsourcing for training space. Pooling efforts could redirect time and resources to other pertinent work, and ensure efforts are put to best use.

There is a newly established Innovation and Improvement hub, which is a vehicle for formal collaboration amongst partners interested in improving rural health and care, as well as influencing local and national policy and strategy. This has strong connections to the education, training and development agenda.

*SCW – 15 days for social workers; RCN – 27 days for nurses; **GMB** – 30 days for Medics.

**Statutory and Mandatory requirements across Health and Social Care

3.2 Gaps and opportunities

A comprehensive assessment has been undertaken in understanding the gaps and opportunities that exist. These are summarised as:

- A truly integrated health and care training offer and/or central coordination and planning model doesn't exist. This is not too dissimilar to other parts of Wales and/or across the UK.
- The Leadership development offer is more developed and spans across both sovereign bodies in county, however, there is more work to do to open this up for the third sector and potentially wider public sector organisations.
- Training placements for social workers are delivered through Open University (OU), and no current formal agreement with brick universities in Wales and/or across the borders into England exist. There is further work to do around the engagement with academic partners and the development of mentors within the system to support an increase in trainee social care workers placements. Also, there is an age requirement for the social care worker degree (18 years), a consideration of a career pathway from 16+ to 18 bridge this gap is required.
- The academic element of the nursing degree/social work degree is delivered either out of county and/or via OU. National colleagues (HEIW and SCW) are keen to work with local regions across Wales to upscale new in-reach educational opportunities, combined with blended models of learning. Powys would be an ideal location for some of this national work to take place.
- The majority of Primary Care & Medical education and development is managed separately, again this is not too dissimilar to other areas in Wales. The Welsh Deanery however is keen to work with Powys as a region to train more medics in a rural setting through credentialled programmes such as Rural Care and Palliative Care.
- The current education facilities in county are dated, there is no simulated/ test and trial scenario-based learning space and limited dedicated modern training space.

- The Innovation and Improvement Hub, although is in its infancy stages and offers a unique opportunity to bring more research, development and innovation into county through trial and testing.
- There is also a legal obligation to support the Welsh Language Active offer, creating opportunities for Welsh speakers to access to education, training and development through the medium of Welsh and enabling non-Welsh speakers to be able to learn.
- There is further work to do with local schools and colleges to help students learn about the health and care sector, and additional discussions required to create educational pathways into health and care to meet the increasing demands of the workforce system.

4. HEALTH AND CARE ACADEMY PROPOSAL

4.1 Overview of Ambition

By 2027, that aim is that through a Powys Health and Care Academy model a modern education, training and development approach will be established and thriving. It will provide access for a multi-agency, multi-disciplinary workforce that includes carers and volunteers working in partnership with paid employees to access high quality education, training and development. With the skills, knowledge and expertise gained through the Health and Care Academy, the combined workforce will work together to deliver seamless health and social care to those who need it. This will support a compassionate and collective culture, bringing benefit to the workforce, citizens, communities and wider economics.

Specifically, the Health and Care Academy sets out an ambition to:

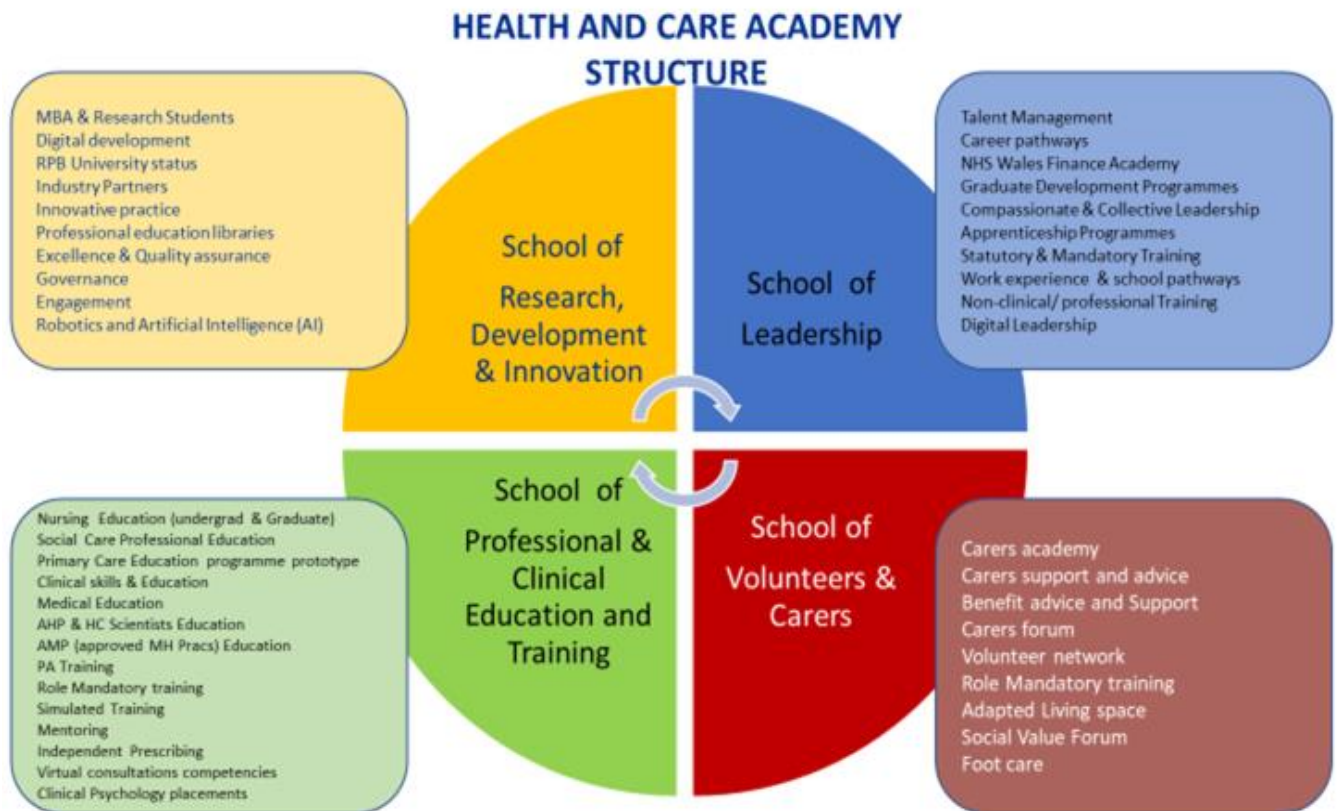
- Be an exemplar provider of rural professional and clinical education, by delivering an integrated in-service training offer that focuses on direct care, shared care and care delivered through digital;
- Be the sector of choice by growing the health and care workforce through skills development, education and local training, working with wider education providers and supporting the Welsh Language;
- Have a Leadership talent operating at all levels, compassionately working across systems making a difference to the citizens and communities of Powys and empowering their teams to do so;
- Enable the workforce to respond to people's needs in a timely way, including our volunteers and paid and unpaid carers, through skills development, education opportunities.
- Be recognised as a centre of excellence for research, development and innovation within Wales, through trial and testing techniques; that includes a well-established industry relationship, and supporting our core economy.

Operating as a hub and spoke model across many sites in the county, it will offer modern, practical, academic and digital learning opportunities for staff, volunteers and carers, through four schools of learning.

4.2 Outline of Schools approach

The Health and Care Academy, heavily focused on integrated approaches, will be built around four conceptual 'schools', with each 'school' offering a collaborative portfolio of specialism underpinned by research, development, innovation and strong leadership. The success of each school will rely heavily on the interdependencies of the other schools. Planning the programmes of work and interrelated activities will require combined leadership approach to ensure a whole system approach is adopted.

Figure 3: Overview of the 'Schools' approach



i. School of Professional and Clinical Education and Training

This will build a strong reputation of applied study across all health and care specialities, giving learners the opportunities to gain professional and clinical skill and expertise in modern simulation environments, whilst studying alongside other multi-disciplinary teams and professionals embedding peer support and collaborative working. The Schools' strength will be developing a rural professional and clinical education training offer, supporting the workforce to deliver innovative models of care.

Building better relationships with Academic partners, Health Boards and Trusts and HEIW and SCW, the School will increase the in-reach academic education into the county spanning nursing, social care, allied health professional, medicine and primary care training. This school will support the existing workforce to operate at the top of their

profession. This will be achieved through capitalising on our unique community based Primary Care service, and testing a future proof primary care prototype model through the lens of a rural community-based model of care. The ambition to enhance our current clinical primary care training, increasing in-county placements and becoming the expert in rural credential training.

The areas this School will cover include:

- Nurse Education (undergraduate and graduate)
- Social care professional education
- Primary care education programme prototype
- Clinical skills and education
- Medical education AHP and healthcare scientists education
- AMP (Mental Health) Education
- Physicians Associates training
- Mandatory training
- Simulation training
- Mentoring
- Independent prescribing
- Virtual consultations competencies
- Psychology placements

ii. **School of Research, Development and Innovation**

A fundamental element of the Health and Care Academy and a core part of the Innovation and Improvement Hub, the School will provide a focal point to support and grow a culture of learning and improvement. The aim is to equip the County's health and care workforce with the skills and confidence to identify improvement needs in their areas, and to systematically make those improvements, measuring and demonstrating the impact that they have on citizen patient experience. It will complement the other schools by underpinning their work through the lens of research, development and innovation.

Through embedding a robust approach to Innovation, Research and Improvement there will be support for local health and care workers to develop ideas and be a central point for external partners to collaborate on ideas and provide clinical expertise to drive forward priority areas most relevant to the Powys population. The School will provide facilitated support, governance and measurement for innovations, research and improvement. The approach is to focus on both:

- a. Supporting the work to redesign systems, services and processes which enable people to receive the right support and care, in the right place, at the right time while also reducing harm, waste, duplication, fragmentation and unwarranted variation.
- b. Supporting the development of cultures of continuous quality improvement and innovation so that every person working in health and social care is engaged in the work of improving their day to day practice.

The School will combine a person-centred, evidence and data informed approach with the systematic application of design methodologies, quality improvement methodologies

and relational change management. The School will support an increase in research students i.e. MBA and PHD studying alongside staff in county, supporting the development of services, and also focus on building relationships with industry partners.

The areas this School will cover include:

- MBA and research studies
- Digital development
- RPB University status
- Industry partnerships
- Innovative practice
- Professional education libraries
- Excellence and quality assurance
- Research governance
- Robotics/AI

iii. **School of Volunteers and Carers**

The School will focus on providing education, training and development support to volunteers and carers, as a core and important part of the broader workforce. There will be a skills development portfolio on offer, from manual handling and first aid skills to training to care for people with specific needs. There will be access to adaptive living spaces where volunteer and carers can see the latest home gadgets and technology that support people to live independently. The school will also offer a range of opportunities to connect with others through virtual and face to face forums, and provide opportunities for focusing on volunteer and carer on health and well-being through courses and resources.

Available to the young and more mature volunteers and carers, this school will be the place to learn, to connect and to become part of a caring community which supports the delivery of Health and Care across Powys. An emphasis will be placed on the potential of volunteer and carer leaders, experts by experience, alongside a potential to peer support others. The School will also support volunteers and carers from across Powys in association with the 13 local support networks led by the Community Connector Service. This includes their role in bringing together people, organisations, groups and initiatives in order to coordinate action, maximise potential, realise effectiveness, enable efficiency, collect, collate & analyse data & information and pursue future opportunities.

This School will include:

- Carers Academy
- Carers support and advice
- Volunteer Network
- Role training
- Adaptive living
- Social Value Forum

iv. **The School of Leadership**

The School seeks to support the development of leaders across the whole health and care system in Powys. Investment in system and collective leadership will enable this approach to stand out in Wales as well as equip people for the modern leadership challenges and opportunities of integrated and whole system care. Leadership talent development will form a core element exposing new and emergent leaders to exemplar leaders in action at all levels. There will be clear career pathways established across systems that will enable leaders to understand the whole system, and increasingly this will start at the individuals point of entry i.e. apprenticeships through to Executive development programmes.

The School will ensure leaders know and understand how they manage themselves, the services they deliver, the outcomes they achieve and where relevant, the people they lead. Leaders will support the workforce, through effective coaching and mentoring, to be able to adapt quickly to the changing nature of health and care. Leaders will have the ability to flex their style to work successfully across boundaries and engage with the workforce to play a key role in the future design of new services. They will be bold, focused on citizenship, social partnership, the wellbeing of their teams and most of all outcomes that deliver seamless health and care services in Powys.

Cultural concepts will be learnt to enable our leaders to play a key role in shaping the culture of organisations. Leaders will focus on developing a positive, inclusive and people-centred culture that engages and inspires all our people and has a clear focus on improvement and advancing equality of opportunity. Learning in modern physical spaces, and through research, development and innovation, Leaders will understand how to best deliver the latest digital transformation across the systems we work in.

An inclusive approach will be taken working closely and develop partnerships with other Academies and leadership collaboratives. One such example is the potential partnering with the Finance Academy, with an ambition to create opportunities for finance professionals in leadership roles to learn about the integrated system in Powys.

This School will include:

- Career pathways
- Talent management
- NHS Wales Finance Academy partnership
- Graduate Development Programmes
- Compassionate and collective leadership development
- Digital leadership

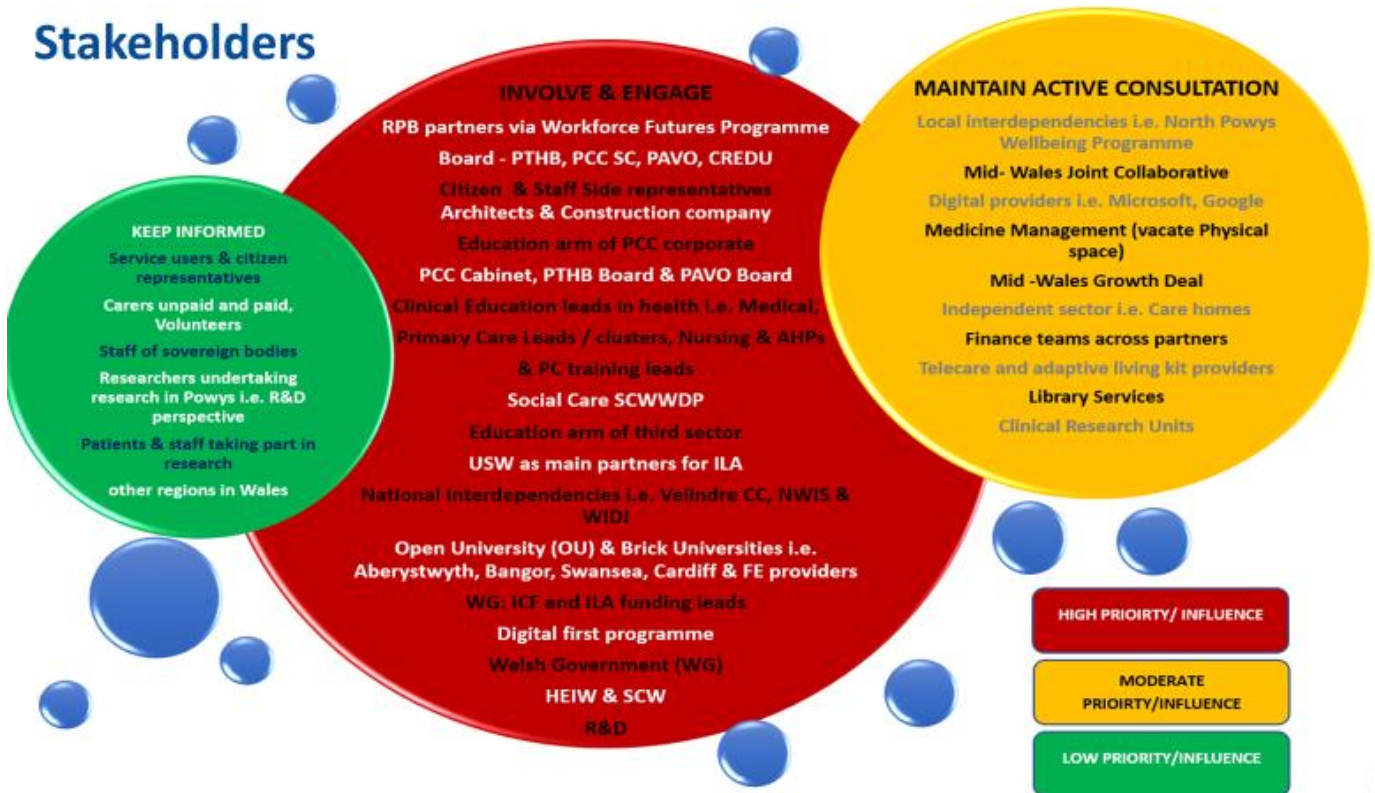
5. WORKING IN PARTNERSHIP TO DELIVER THE AMBITION

5.1 Stakeholders and Partners

Working in collaboration with stakeholders as been a key element of the work to date and will continue to take place across the life span of the programme of work. These

include those who are interdependent in the work and those who will be guided by, keep engaged and informed, and others who will receive an active consultation.

Each pivotal point of the work will involve different stakeholder engagement. The stakeholders we will engage with during the collation and laying foundation stage can be found in diagram 1. The stakeholders who sit in the red circle of the diagram will be highly influential and will be highly interested. Those who sit in the amber circle will be moderately influential and interested and those in the green circle will be keen to understand the outcome of the service delivery.



Health Education Improvement Wales (HEIW) and Social Care Wales (SCW)

Capitalising on the work underway by HEIW and SCW to deliver on the National Workforce Strategy will enable us to support the National activities at a local level, such as increasing in-reach and blended educational opportunities, specialising in Credentialed rural training, advancing the primary care education model and adopting collective and compassionate leadership across health and social care in Wales.

NHS Wales Finance Academy

Adopting a similar model to the successful NHS Wales Finance Academy not only enables learning to take place from NHS finance colleagues about a well-established, successful model, but will encourage Finance leaders and professionals from across the system to come and learn in county about our integrated health and care model of working.

Welsh Government (WG) Intensive Learning Academy (ILA)

The University of South Wales (USW) proposes the delivery of an Intensive Learning Academy (ILA), which focusses on the development of highly capable leaders from across the Public sector in Wales that embrace digital technologies and innovation. The primary focus of the ILA will be the delivery of a Master's programme in Digital Transformation Leadership Academy/ Leading in a digital world, piloted in Powys, which will drive the theme of content for CPD modules, and other qualifications and learning experiences at from apprenticeships to level 7.

Developed in collaboration with Powys Regional Partnership Board (RPB); specifically, the Workforce Futures Programme Board and in consultation with Social Care Wales (SCW), Health Education Improvement Wales (HEIW), NHS Wales Informatic Services (NWIS) and Velindre cancer care (VCC) and leaders from across NHS Wales. This partnership will bring an investment into Powys.

Powys County Council Education Transformation Programme

The transformation of education in Powys is underway. There is potential of a longer-term vision for the Health & Care Academy to potentially become a faculty of a wider Rural Academy of Learning. In the short-term close working is taking place with Education Colleagues to ensure there are clear post 16 education pathways into health and care in Powys.

5. IMPLEMENTATION/MEASURABLE OUTCOMES

Further work is required on implementation. This would include the governance within the RPB and with individual organisations to drive forward this work. This will also include the development and agreement of measurable outcomes. An outline below is provided that steers the work in terms of the more immediate deliverables.

By the end of the 2021/22 the outcome will include:

- 1. A recognisable 'brand' and offer from the Academy**
- 2. Clear programmes of work for each of the 'School' areas, including demonstrable progress in enhancing the current offer.**
- 3. A well-established partnership approach to working with a wide range of provider organisations, supported by effective governance**
- 4. An Academy Hub building offering a modern learning environment**
- 5. A detailed 3-year plan for the further development of the Academy**
- 6. Evaluation and user feedback relating to the impact of the Academy.**

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