

Learning and Skills Scrutiny Committee

Meeting Venue
By Zoom

Meeting Date
Monday, 15 January 2024

Meeting Time
2.00 pm

For further information please contact

**Katharine Flanagan-Jones,
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Officer**

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County Hall
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09/01/2024

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.

The use of Welsh by participants is welcomed. If you wish to use Welsh please inform us by noon, two working days before the meeting

AGENDA

1.	WELCOME AND APOLOGIES
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Welcome Cllr Carol Robinson to the Committee membership.

To receive apologies for absence.

2.	DISCLOSURES OF INTEREST
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To receive any disclosures of interest by Members relating to items to be considered at the meeting.

3.	DECLARATIONS OF PARTY WHIP
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To receive disclosures of prohibited party whips which a Member has been given in relation to the meeting in accordance with Section 78(3) of the Local Government Measure 2011.

(NB: Members are reminded that under Section 78 Members having been given a prohibited party whip cannot vote on a matter before the Committee.)

4.	ELECT A VICE CHAIR
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Committee to elect a Vice Chair for the remainder of this municipal year, the elected Member will also be a Member of the Public Service Board Scrutiny Committee. NB The Vice Chair must be a County Councillor.

5.	MINUTES
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To authorise the Chair to sign the minutes of the following meetings as a correct record:

13th September 2023

20th September 2023

17th October 2023

(Pages 3 - 50)

6.	SCHOOLS FUNDING FORMULA
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To receive and consider a report on the Schools Funding Formula from the Portfolio Holders for Finance and Corporate Transformation, Cllr David Thomas and for a Learning Powys, Cllr Pete Roberts.

(Pages 51 - 144)

7.	WORK PROGRAMME
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To note that future meetings of the Committee are scheduled as follows:

(Pages 145 - 146)

Committee Reflection

Following the close of the meeting the Committee is asked to spend 5 to 10 minutes reflecting on today's meeting.

Public Document Pack

Learning and Skills Scrutiny Committee Wednesday, 13 September 2023

MINUTES OF A MEETING OF THE LEARNING AND SKILLS SCRUTINY COMMITTEE HELD BY ZOOM ON WEDNESDAY, 13TH SEPTEMBER 2023

Present:

County Councillor Gwynfor Thomas (Chair)

County Councillors: G D Jones, D Bebb, M Beecham, AW Davies, D Meredith, G Morgan, and G Preston.

Co-opted Member: K Chedgzoj, S Davies, M Evitts.

Cabinet portfolio Holders in Attendance:

County Councillors:

P Roberts, Cabinet Member for a Learning Powys.

D Thomas, Cabinet Member for Finance and Corporate Transformation.

J Charlton, Cabinet Member for a Greener Powys.

Officers: Lynette Lovell, Director of Education and Children's Services, Georgie Bevan, Head of Schools Service, Eurig Towns Schools Service Improvement Manager, Sarah Quibell, Service Manager for Education Support Services.

1. APOLOGIES

Apologies for absence were received from County Councillor Sue McNicholas.

2. DISCLOSURES OF INTEREST

There were no declarations of interest from Members relating to items for consideration on the agenda.

3. DECLARATIONS OF PARTY WHIP

The Committee did not receive any disclosures of prohibited party whips which a Member has been given in relation to the meeting in accordance with Section 78(3) of the Local Government Measure 2011.

4. MINUTES

Documents Considered:

- Minutes 19th July 2023

Minutes agreed by Committee members present as a true and accurate reflection of the meetings and authorised accordingly by the Chair.

5. PERFORMANCE AND RISK Q1

Background:

The Corporate and Strategic Equality Plan contains the priority work for the Council, driven by the Cabinets ambitions.

Scrutiny Committees have been requested to review the 3 well-being objectives:

1. Improving awareness of the Councils services and how the public can access to make informed choices.
2. Good quality sustainable employment, training opportunities and pursuing the living wage accreditation.
3. Tackling poverty and inequality.

Learning and Skills would have an impact on access to services, the workforce, poverty, and inequality.

The scorecard records how services have delivered against objectives, what future actions are required, and lessons learned.

Schools Service have made significant progress on the Child Poverty Plan within Q1. the provision of cookery lessons to parents in the south of Powys has led to potential employment within the catering service.

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
With regard to Objective 1, Intervention and Prevention what level of children are benefitting.	Teams at all different levels, the Youth Service provide intervention at key points. The Schools Service continue to work closely with Children’s Services and Commissioning across the different age spectrums. The Service has Education Welfare Officers and Family Liaison Officers having utilised the Community Schools and the Family Liaison Manager grants to assist recruitment and also support schools further afield. In addition to statutory work undertaken, the service has invested the grant funding into those areas and implemented support not only with learners but with their families.
In relation to the public consultation, it is worrying that the public do not seem to see the importance of the consultations, which is borne out through the disappointing number of responses. How can the Council make sure that the public are encouraged to get involved and reassure that their response and participation are valued when decisions are made.	
Committee member expressed concern at the equality of service delivery across Powys, the Deputy Leader of the Council was challenged prior to the summer holidays as to what was available, in particular in the Llanfyllin area, amongst a whole raft of projects listed including SHEP, nothing	In response to the SHEP programme eligibility, 7 schools took part in this programme across Powys, renamed Food and Fun, over the summer period. There was very clear criteria for which schools could apply. The application round for next year is commencing shortly and remains

<p>was available. We have heard of various pilot projects being undertaken, however under the banner of Fairer in the Councils objectives, equality of service delivery across Powys is lacking.</p> <p>How many schools deliver Early Year provision within every school catchment across Powys, are there indicators to show equality of service delivery.</p> <p>Under objective 2, it must be noted that Powys are already a Real Living Wage employer, what difference will Powys residents see if Powys CC is an accredited Real Living Wage employer.</p> <p>Aware objectives reflect the Corporate and Strategic Equality Plan, perhaps focus should be on annual review of the plan.</p>	<p>according to the eligibility of Free School Meals provision within that school, this cannot be provided across the cluster with schools staff working through the summer period. The programme is fully funded via grant by the WG with the noted criteria threshold.</p> <p>We can assure that the support for all Powys schools in a phased approach around the RADY (Raising Attainment of Disadvantaged Young People) agenda and built into the Child Poverty taskforce. The programme does not depend on numbers of disadvantaged children but concerned with enabling teachers and the school to provide a more usable approach in their teaching to support all learners but particularly those more vulnerable. Powys have been chosen, due to the strong School Foundation team, to pilot RADY into the foundation phase.</p> <p>Within the Service, EWO's and Attendance Officers are providing a more holistic approach to support the whole family across all schools.</p> <p>Cabinet Member responded to the impact a Real Living Wage employer accreditation would have on residents in Powys was around contract management with Powys CC's suppliers bringing distinct and positive benefits across the Powys economy.</p>
<p>The Corporate Plan and objectives needs more relevance, how was the Stronger Fairer Greener plan incorporated into education. Committee would like to see more evidence and outcomes of links to schools and the workforce brought to Scrutiny Committee.</p>	<p>Will improve upon narrative and evidencing outcomes for Q2</p>

Actions

- **Committee would like to see more evidence and outcomes of links to schools and the workforce brought to the Scrutiny Committee.**
School Service to improve upon evidencing pupils outcomes for Q2.

6. UPDATE ON EARLY YEARS PROVISION

Background:

Report shared within the agenda pack on Early Years Provision standards, progress, and outcomes for learners.

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
<p>What percentage of pupils have taken advantage of the 10hrs and accessed Early Years provision.</p>	<p>The numbers are approximately 1688 out of approximately 2400 pupils who had accessed education, some have taken the full 10hrs allocation others have taken a percentage. There are other children who access childminding or nursery provision, Powys does not allocate to these settings, with other children due to our borders accessing provision in other counties or in England.</p>
<p>Does the service have a breakdown of the demography</p>	<p>There are 72 setting within Powys, with places allocated to all early learners. Over the last 5 years, learners have all received places within their requested clusters.</p>
<p>Roughly a third of pupils are not accessing Early Year provision, has work been undertaken to understand reasons or barriers why offer was not accessed.</p>	<p>Some places not taken up due to where parents are working or other personal circumstances, placing into childcare or private nursery provision that provide 30hrs provision, and who can obtain the 10hrs funding via WG, although the 10hrs is non-statutory. Some Powys settings only provide the 10hrs of education, without further wrap around childcare provision.</p>
<p>What are the reasons preventing Powys making those 10hr provisions into 30hours wrap around care settings.</p>	<p>Powys is only able to provide the 10hrs contract for the educational provision, if settings at their discretion wished to provide 30hrs they could do. There are different regulations for 30hrs to 10hrs provision as the 30 hours is only childcare provision.</p>
<p>Welsh medium provision has been static for some time, it is a problem that requires a solution.</p> <p>WESP has not been proactive with progress not realised; the geographical spread has not changed at all.</p>	<p>Work is undertaken with Mudiad Meithrin, including settings in Machynlleth and Ystradgynlais converting to Welsh medium provision in the last two years.</p> <p>The WESP has looked to increasing the provision of Welsh medium education again with support from Mudiad Meithrin.</p> <p>WESP continues to build on access for</p>

<p>The problem is that the 26% quoted is more like 60% of pupils in a setting.</p>	<p>all learners to a Welsh medium option. In the first year of the new WESP, the move to Welsh is working throughout the County, the target is 30% and it is hoped to build on this further.</p> <p>We acknowledge there needs to be improvement from Primary Sector to Secondary. Where Early Years is provided through the medium of Welsh there has been a greater number of learners transitioning into Welsh medium Primary Education.</p>
<p>The Scrutiny Committee has requested a number of years ago the actual amount the County had saved by the raising of the school age to 5years.</p>	<p>Assurance given that within the 3+ settings, there is a very strong Estyn profile in terms of pupil outcomes, standards, provision, and leadership. In terms of monitoring the savings made this could be included in a future meeting, following discussion with finance colleagues.</p> <p>Funding received from WG which stands at £5 per child is being used on Early Years education.</p>
<p>The Incredible Years programme was brought into Powys in 1993 is this required again.</p>	<p>Incredible Beginnings was brought in 2020 by Caroline Webster Stratton who designed the Incredible Years programme in 1993, as realised there were issues which required to be addressed with much younger pupils. The programme has been well received by Powys settings as a programme to support our learners, post pandemic.</p> <p>Powys have also been using the Well-Com programme.</p> <p>Post pandemic, settings were noticing issues with speech and language, with an increased number of referrals to SALT.</p> <p>Training has been rolled out to address these particular issues as well as to take the education platform forward.</p>
<p>Is ALN (Additional Learning Need) dealt with through Early Years provision as per Schools.</p>	<p>Same systems are available to Early Years provision under the ALNET, as ALN is from 0-25yrs.</p> <p>TYFI system is used to record support. The training has been made available to settings as per schools through working with the ALN team to address ALN needs.</p>

<p>How does the funding work</p>	<p>Settings do not have specific ALN allocated funding but have access to the ALN team. They can apply for funding through the TYFI system. With support given relevant to the needs of each pupil. ALN support is not based on geography but the needs of the individual learner.</p>
<p>Are settings funded on £5 per hour</p>	<p>No, they are not yet funded at £5 per hour. When settings were established, Powys designed a funding formula that would ensure all settings were able to function. The settings range from 8 to 85 children, we required a system where there were sufficient staff in settings. The ratio was 2adults :16children with a continuing ratio of 1:8 thereafter.</p> <p>WG have now stipulated that all LA's from 2024 fund at £5 per hour for the 10hrs of Education.</p> <p>This would apply pressure to settings especially those that have less than 8 children to have funding to pay for the 2 members of staff required. The CIW (Care Inspectorate Wales) regulations stipulates there must be 2 members of staff.</p> <p>We have been phasing the new regulations in and looking at ways that those settings with low numbers can be supported and remain financially viable.</p>
<p>Concern held for those smaller settings under the new funding formula</p>	<p>More support has been provided and explains the reasons for not changing immediately from the current funding formula to the £5per hour, as aware of the concerns. We continue to look at solutions with those particular settings as to how to proceed under the new regulations.</p> <p>Under the new contracts, settings need to know if they are financially viable, can they provide the service Powys requires, a huge element of this would be funding. Over the next year work will be undertaken around will this work what can we do, can children be taken slightly earlier to assist with finances as the overarching concern is that existing provision be maintained.</p>

Settings numbers are volatile year on year does this cause problems.	Yes, it does, attendance figures do change, and we do not want to lose our Welsh provision settings, it is an important part of education provision in Powys
This could be an issue that we revisit for updates throughout the year.	

Actions

- **Committee requested the actual amount the County had saved by the raising of the school age to 5years.** In terms of monitoring the savings made this could be included in a future meeting, following discussion with finance colleagues.

7. CURRICULUM FOR WALES

Committee decided to hold item over until the next available meeting.

8. SECONDARY SCHOOLS IMPROVEMENT STRATEGY - PROGRESSION AND LEARNING

Background

Report shared within the agenda pack on School Improvement Strategy setting out the background and progress of the strategy from February 2021 to May 2023. May 2023 received an improvement conference undertaken alongside Estyn culminating in an Action Plan, currently being implemented. Presentation given to Committee on the Post Estyn visit Action Plan.

Action Plan 6 Key Priorities:

1. Learning and teaching
2. Improve relationships with Headteachers.
3. Review reporting including the School Support log system.
4. Professional development.
5. Performance Management
6. Ensure that support has a positive effect on school improvement, it is consistent, and the team evaluate its effect.

Main focus for this year is to: Improve the quality of teaching and learning experiences across Powys secondary and all-age schools.

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
A detailed Action Plan with a high level of work to be undertaken, did this all come from the recent Improvement visits earlier this year.	A large proportion came from the visits but also from the internal evaluations undertaken throughout the year, which included feedback from Headteachers and schools. The Director for Education confirmed that Estyn reviewed the Inspection recommendations from 2019 and 2021

	<p>for the recent extended visit. The visit was robust involving Headteacher, stakeholder groups and Scrutiny Chair discussions. An outcome letter was provided to the Interim CEO, with points to consider and verbal areas for improvement and monitoring moving forward. For information purposes the link Inspector visits half-termly.</p> <p>5 Secondary schools are due inspections through this academic year, reports will be brought to Scrutiny Committee to monitor progress, how effective the support has been and how effectively the schools have delivered this support.</p>
<p>There seems to be a disconnect between the presentation given and the report, 5 conclusions of the short-term priorities, the first 4 conclusions are:</p> <ul style="list-style-type: none"> • Improving the quality of learning, improving self-evaluation, • Improving standards of literacy • Improving attendance <p>Surely these are always priority areas which could be at the end of any report concerning education as very generic. Would prefer to see more specific short-term targets.</p> <p>Chair interjected that Scrutiny have not received enough information to form judgements as to whether outcomes are being achieved. In addition, schools with concerns are not being highlighted.</p>	<p>The report is evaluating progress on the Secondary Strategy, to map the way forward. The plan for secondary and all age improvement, sits behind the Strategy, updated in May 2023 outlining more precisely the improvement priorities in schools.</p> <p>The action plan relates to the way the Schools Service team works with and supports schools to have as much impact as possible.</p>
<p>What is the baseline referred to in Pt 2.7 of the report, is this the same for Welsh and English medium schools, as the baseline for provision of Welsh medium education is effectively non-existent.</p>	<p>In January 2023 visits were undertaken to all schools in Powys, information gathered was used to establish the baseline of provision across the secondary, all age, dual stream, and Welsh medium. Each school received a report tailored to their own priorities, which forms the Secondary Improvements Plan.</p>
<p>On developing a baseline of provision would this outline what the fundamental curriculum should be for</p>	<p>This related to knowing the schools well, work alongside schools and evaluate where they were in terms of</p>

<p>each secondary school pupil.</p> <p>Baseline is formed on the self-evaluation rather than educational provision. The quality of teaching rather than what is being taught.</p> <p>Is there a baseline for the breadth of curriculum offer in Secondary Schools.</p> <p>How can improvement be measured in dual stream education specifically the Welsh Medium subject offer. Parents should be informed of what the actual provision given is.</p>	<p>self-evaluation, learning and teaching, pupil literacy and numeracy skills. There were some key themes that were seen across the spectrum, however work undertaken to support the schools to identify their unique key priorities.</p> <p>The baseline is not the breadth of offer, it is the teaching provision in schools to enable the progression in learning. Reviewing the quality of the learning from the teaching and the teaching and the learning in one.</p> <p>We are working on the Curriculum mapping for Scrutiny and information is required from the individual schools as to subjects taught across years 7 to 10. Information can be accessed for GCSE and A level outcomes.</p> <p>This will be included in the information noted above for Scrutiny.</p>
<p>A baseline has been established for all schools, we look at the finances of schools on an anonymised basis, which schools are causing concern, what are the influencing factors, could similar information be sourced for the standards of education as well as assurance be given for continuous improvement.</p>	<p>Individual schools do have those reports, to inform the improvement plan re: key themes, which could be shared.</p> <p>There would be comprehensive reports by Estyn on the 5 schools due inspections in the academic year.</p> <p>As part of the report, references to “most, many” used the evaluative Estyn language to how terminology references numbers. Service to share terminology table with Scrutiny.</p> <p>The criteria held on schools causing concern includes deficit budgets but also a plethora of other data, HR, leadership capacity. The Secondary Team have produced data on standards provision, leadership, self-evaluation, and effectiveness of the data on each school. Good practice should also be shared, and the Service will continue to work with Scrutiny as to the best methods to bring information forward.</p>

	<p>We are waiting on the verified data from the full exams undertaken in the summer of 2023 to share with Scrutiny to allow for benchmarking against the whole of Wales.</p> <p>We should not be waiting for Estyn reports, we should be able, as an improvement team, to identify the areas of schools need. As a result of our own evaluation, we have the action plan to make sure we improve going forward and welcome Scrutiny Committee to monitor progress.</p>
<p>The Chair requested that Scrutiny need to see evidence via Estyn reports, previously received the information provided by ERW, we have requested on numerous occasions to have information in relation to schools causing concern, we need to be seeking assurance that our schools are on the right track with progress made.</p>	
<p>Powys does not have a single secondary school that is fully Welsh medium. Unsure if Estyn would have confidence in the performance of Secondary Welsh medium education provision in Powys.</p> <p>In the report shared, Welsh medium education is mentioned 3 times, therefore Scrutiny do not learn anything on the state of Welsh medium education provision. There should have been a whole section focussed on the provision of Welsh medium education across Powys, as there has been no progress made over a number of years</p>	<p>Support for the development of the Welsh language educational provision has been highlighted as an area of priority.</p> <p>There is not currently a Welsh speaking Officer in the Secondary School Improvement Team as have been challenges with recruitment process i.e., no applications.</p> <p>The Schools Services have brokere4d support for Welsh medium education through the MWEP (Mid Wales Education Partnership) all dual stream schools have Welsh medium officers involved equitable to officers supporting the English streams.</p> <p>The provision of a dedicated Welsh medium SIA is something we need to consider going forward.</p>
<p>Concern raised for those schools who have not made progress against their development plans.</p>	<p>Training on school development planning was provided, with 1:1 support by their SIA's.</p> <p>Schools where improvement was not made had more intensive support across the summer term. This year's Schools development plans are due to be submitted by the 15th September.</p>

<p>It is worrying to note that on many occasions teachers have a low expectation of the pupils' achievement capabilities.</p> <p>Could Scrutiny be provided with the guarantee that SIA's, subject advisors are ensuring all schools are meeting targets.</p>	<p>The Action plan notes clear and focussed actions to support schools with improving learning and teaching experiences achievements for learners. SIA's have ben into schools to discuss steps to be taken, outlining support, and ensuring officers are in schools advising what good teaching and learning looks like, brokering support through the professional learning team and Cluster insets for learning and progression, strong pedagogy.</p> <p>If SIA's were concerned that particular school were not focussed on areas of required improvement, this is escalated, with schools also invited to support and challenge meetings.</p>
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9. ADMISSIONS CODE & CAPACITY

Presentation on Admission Arrangements provided by Sarah Quibell.

Background:

Admission Arrangements are governed by the following Welsh Government Legislation and guidance:

- Measuring the capacity of school in Wales 2011, which details that:
 - 'The admission number is the number of pupils who should be admitted to a relevant age group if sufficient applications for places are received.'
 - 'Pupils may not be refused a place until the admission number is reached.'
 - 'The number is calculated by dividing the capacity by the number of year groups to be accommodated by the school.'
- Schools admission code: Statutory Code document no:005/2013.
- School admission appeals code: Statutory Code document no:007/2013.
- There are 3 types of admission application Primary, Secondary in year transfers.
- Admission arrangements by the LA covers all schools with exception of the 7 voluntary aided and faith schools, who undertake their own admissions, and the 3 Special schools and the Pupil Referral Unit which have specific admissions processes based on pupil need.
- The LA has a statutory requirement to consult on admissions arrangements an annual basis, between 1st Sept and 1st March.
- Admission arrangements are determined by the 15th April and must be published by October. Powys usually publish during August, for the following academic year.

- The Admissions Timetable outlines the Common Offer Dates for the Primary & Secondary School Admission Rounds, the latest date for appeals to be received, and date by which appeals must be heard.
- Statutory limits on Infant classes exists as should not contain more than 30 pupil, however, there may some certain limited exceptions to this.
- The scope of an admission appeal panel to uphold an appeal for an admissions application that has been refused on class size prejudice grounds are limited.
- The appeals process is made up of two stages Factual and Balancing, the appeals panel has to be independent of the LA, with a split between panellists with previous education experience and lay members.
- The decision by the Appeals Panel is binding on the LA and the school involved.

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
What formula is used	The Welsh Government formula is provided in the measuring the capacity of schools in Wales document, which reviews the number of class bases, size of staff room, toilet provision, corridor space. Headteacher would provide the information to the Property Team, to run data through the formula,
Aware of cases where pupils have been refused a place where there have been no discussions with head teachers or governors.	The LA is the admission authority for all schools, with the exclusion of the 7 voluntary aided and faith schools. We admit up until the admission number has been reached and then applications would be refused.
There are issues with schools where they have not reached capacity	If in relation to a specific school, will take conversation out of this arena.
Clarity required for parents and learners over catchment areas.	Consultation will be undertaken prior to March 1 st , 2024, and will have close alignment to the transport policy.
Lack of information to parents, publications of catchment areas needs to be completed.	There is requirement is to consult with Governing bodies however we also ensure information circulated to Head Teachers, as well as parents, as required.
If a school has a chosen catchment secondary school, there is no leeway within the admission code for a learner to choose another alternative secondary school	In the admission code parental preference is key, a parent can choose any school. In an over-subscription scenario, the published criteria would be applied, and the places allocated accordingly. There is a published Transport Policy which dictates who would be eligible for that transport.
The scenario above of two separate	In terms of a received application, there

<p>catchment, without discussion with Headteachers and Governors, without discussion with the High school Governors, this could change the balances of the pupils in the high school, surely this should be discussed with all parties. Where would the concept of catchments come into the scenario.</p>	<p>is a parental right to apply to any school they desire, if there are places, the LA are obliged to allocate. It would not be appropriate to hold discussions with Head Teacher or Governor concerning individual pupils. The catchment area would come into play in an over-subscription criteria situation.</p>
<p>Where a Primary school has chosen a catchment Secondary School, the Secondary School would have not had any influence on this decision and would therefore limit the choice to that prescribed by the Governing Body of the Primary School.</p>	<p>The schools would be referred to the published formal admission arrangements which would be for the school to give a response on any proposed changes when the consultation is opened.</p>
<p>Are Secondary schools part of the consultation on Primary schools.</p>	<p>In terms of admissions consultation, the proposed admissions arrangements are forwarded to all Governing Bodies, neighbouring LA's, Diocesan Representatives and to all head teachers of all schools.</p>
<p>In Primary schools the Head Teacher determines which pupils go into which class i.e., 2-year groups in one classroom etc. The Admissions team officers would be informed when classroom capacity has been reached.</p>	<p>The arrangement of classes is an operational school decision. This would be a separate matter under the pupil admissions number, and how many pupils a school can safely accommodate. If there is a change to the use of space within a school, the headteacher should request a review of the building capacity assessment which may result in an amended admissions number.</p>
<p>How many admission applications have Powys rejected, and how many appeals have been won or lost.</p>	<p>Do not have the figures on the number of rejected applications, 93 appeals were submitted in 2022-23, appeals can be stood down if places become available, not all 93 progressed to the appeals stage. approximately 60-65 % were upheld.</p>
<p>Were the appeals predominantly Primary or High School appeals. Information to be shared to Committee members, outside of this forum where issues may exist.</p>	<p>There have been as many in-year appeals as there were for Primary and Secondary, some of which are still in progress.</p>

Actions:

Appeals for 2022-23 for Primary, Secondary and In-Year - School Service to provide information to Committee members, outside of this forum, for where issues may exist.

10.	WORK PROGRAMME
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To be reviewed at the next available meeting.

**County Councillor
R G Thomas (Chair)**

Public Document Pack

Learning and Skills Scrutiny Committee Wednesday, 20 September 2023

MINUTES OF A MEETING OF THE LEARNING AND SKILLS SCRUTINY COMMITTEE HELD BY ZOOM ON WEDNESDAY, 20 SEPTEMBER 2023

Present:

County Councillor Gwynfor Thomas (Chair)

County Councillors: G D Jones, D Bebb, AW Davies, B Davies, D Meredith, S McNicholas, Lucy Roberts

Co-opted Member: K Chedgzoy, S Davies, M Evitts.

Cabinet portfolio Holders in Attendance:

County Councillors:

P Roberts, Cabinet Member for a Learning Powys

D Thomas, Cabinet Member for Finance and Corporate Transformation

Officers: Lynette Lovell Director of Schools and Children's Services, Emma Palmer, Interim Director for Transformation and Communication, Georgie Bevan, Head of Schools Service, Marianne Evans Service Manager for Schools Transformation, Sarah Astley Transforming Education Strategic Programme Manager, Mari Thomas Deputy Head of Finance.

In attendance:

Cllr Graham Breeze – to add local Member comment.

1. APOLOGIES

Apologies for absence were received from:

Cllrs G Preston, H Hulme - to add local Member comment.

2. DISCLOSURES OF INTEREST

The Committee received the following Declarations of Interest from Members relating to items to be considered on the agenda. As determined by the Monitoring Officer, K Chedgzoy should not be present during the discussion on the Llanfyllin / North Catchment Review under categorisation of prejudicial interest, as a Parent Governor at Ysgol Bro Cynllaith.

3. DECLARATIONS OF PARTY WHIP

The Committee did not receive any disclosures of prohibited party whips which a Member has been given in relation to the meeting in accordance with Section 78(3) of the Local Government Measure 2011.

4. SECONDARY SCHOOL IMPROVEMENT STRATEGY - CONTINUATION
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Committee in agreement that the continuation of the Secondary Schools Improvement Strategy should be held over until the next meeting scheduled for the 17th November 2023.

5.	CURRICULUM FOR WALES
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Committee in agreement that the Curriculum for Wales item should be postponed until the next meeting scheduled for the 17th November 2023.

6.	SCHOOLS TRANSFORMATION - LLANFYLLIN / NORTH WELSHPOOL CATCHMENT REVIEW
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Background: -

Precis provided by the Portfolio Holder on the process and the proposals set out in the Cabinet report, prepared by Officers with input from the community and Portfolio Holder.

Officers discussed the proposals contained within the following prepared reports in detail:

- Cabinet Paper – Llanfyllin Catchment Review
- Appendix A – Llanfyllin Engagement Report
- Appendix B – Llanfyllin Catchment Review June 2023 V2
- Appendix C – Llanfyllin Impact Assessment

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
<p>Chair noted the Portfolio Holder’s comment that the process had identified the timeframe did not permit all issues to be addressed. Chair added that it had been difficult for local Members, information had been divulged to schools, parents, staff, and pupils who were uncomfortable with the proposals, raised their viewpoints with local Members, who were not, at that time privy to the information detailed in the proposals.</p> <p>The view expressed by local Members, within the Scrutiny Committee, was of dissatisfaction that the matter was being dealt with after the fact. This has led to a difficult situation where other local Members, who had not been included in the process for comment, have requested to speak during this meeting to voice their and their communities views.</p> <p>Local Members did not have sight of the proposals until last week and that was following the intervention by the Council’s Monitoring Officer, in addition there were no local Member comments within the documents for Scrutiny to consider, closing date for which was today.</p>	<p>The Portfolio Holder stated that this matter was brought to Scrutiny Committee at a significantly earlier time in the process than previously. One of the recommendations from the audit report into Ysgol Calon Cymru in 2016 was that there had been insufficient Scrutiny engagement. Scrutiny involvement previously had been at the final objection report stages of the process.</p> <p>The current process allows for review of details in the business case, and rationale behind changes, prior to the commencement of the statutory consultation.</p> <p>Scrutiny Committee therefore have input into the decision-making process of whether to proceed to consultation or not.</p> <p>In terms of local Member involvement, local Members were invited to the discussion session in Llanfyllin, which gave the opportunity to Schools and the Governing Bodies also, to voice their views and concerns.</p>
<p>The report states that the process in the</p>	<p>The previous papers were published</p>

<p>North Powys catchment was re-started in April 2023, when was it stopped.</p> <p>An outline of the differences with the paper from 2020 and progress or actions in the intervening period was requested.</p> <p>Concern expressed that the North Powys catchment area was identified as of primary importance for transformation, why therefore did the Crickhowell catchment transformation programme supersede, as was far lower down on the Councils list of priorities.</p>	<p>following the business case in October 2020, in relation to school modification orders. However, the research based on the business case for the Ysgol Pennant, Llanfihangel, Llanrhaeadr ym Mochnant area, the transformation and build programme in Llansantffraid were not desirable to deliver.</p> <p>Original proposals for Ysgol Bro Cynllaith were brought forward, there was insufficient officer time for proposals to be implemented, in terms of statutory orders. In the intervening time there were a number of transformation pieces of work undertaken and catchment work commenced as soon as officer time was available.</p> <p>The Crickhowell programme was commenced as the Llanbedr site was under judicial review. There was a proposition brought forward to create an All through school, due to both schools being without a Headteacher, The decision was taken to prioritise and provide a settled position in Crickhowell.</p>
<p>The proposals appear to have applied an easy fix by the removal of 3 small schools, prior to catchment changes being undertaken. Concern raised of multiple moves for children until full transformation programme could be completed.</p> <p>There could potentially be pupils of Bryn Hafren school moved to Llandysilio school, Arddleen CP School was noted at capacity, with a later potential merge of Llandysilio, Carreghoffa and Arddleen, in a new build to incorporate the 3 schools, resulting in a further change for pupils.</p> <p>Clarification requested on the future numbers stated in the document included those from new housing projects. As live birth data added to projected numbers in the area, exceeds the number of available places.</p> <p>The Chair added that the points raised above would be similar to the</p>	<p>It would be difficult to transform the whole of the catchment at the same time. It has to be factored in that the Council has these 3 small schools, with proposals for closure. The Council would be required to know the pupil transition pathway and impact prior to progress made on the medium-term plans around other schools.</p> <p>It would take time for capital investment to be secured for a new build which would form a later part of the 10yr plan. Pupils currently in those 3 schools, would not be affected by a new build.</p> <p>Other factors requiring consideration and exploration are the future availability of CIW places, and the option of a future merger of Llandysilio, Arddleen and Carreghoffa schools which are currently in different High School catchments. It is a complex catchment area, and</p>

<p>Llansantffraid, Llangedwyn and Llanfechain proposal, unsure if would be similar for Ysgol Pennant, Llanrhaeadr as a suggestion that Ysgol Bro Cynllaith would not have surplus places.</p>	<p>we need to address where the challenges really are. There must not be a rush to a new build. The future data projections are on live birth data. We are aware of the planned housing developments in the area, which was why there would not be a rush to progress with a new build until outcomes have been realised in the housing developments.</p>
<p>An explanation was requested for why the capital expenditure proposals detailed in the previous plans of Sept 2020 on the Llanfyllin catchment, have been removed from the documents shared with Scrutiny. Surely it would be important to know the timeline and when investment will be made for communities to be brought on board with clear plans and commitments.</p> <p>There are examples within the report of proposed school closure with pupils being moved to a school with a lower conditioning grade. Capital investment and reform should be intertwined.</p> <p>Was it a conscious decision not to publish information which would have given communities and Members a clear understanding of the pathway of investment.</p> <p>Chair commented although the papers discussed new builds in the Llansantffraid / Llanfechain area and the Carreghoffa and Llandysilio area, this was not guaranteed and appeared a desperate situation.</p>	<p>Original proposal from Oct 2020 had an indicative timeline, which was the programme being accepted in Band B of the then 21st Century Schools Programme. Following the collapse of Dawnus the Councils expenditure on committed capital in that programme band had not exceeded the 80% mark, therefore the Authority were unable to advance projects within Band B The proposal was a recommitment to projects in Llanfyllin and Llansantffraid and with the opening up of the Sustainable Communities for Learning 9-year Plan in January 2024, part of our submission would be for those proposals to be included. At this stage there was no direct timeline, as important to get this stage through, then progress a proposed outline business case. The Authority was required to submit a new programme to WG by March 2024. Expected programme was:</p> <ul style="list-style-type: none"> • Years 1-3 projects that will reach full business case within 3years. • Years 4-6 projects being developed, progressing through statutory consultation. • Years 7-9 pipeline projects. <p>Capital investment in the Llanfyllin projects could be Year 4-6 or later years 7-9. Projects will be reviewed on a rolling 3-year basis as progression made. Information on capital investment would be noted in Cabinet.</p>
<p>The financial assessment within the</p>	<p>Cost savings within the documents</p>

<p>documentation shared did not show any cost savings for potential mergers, could the benefit be explained.</p> <p>Surely the cost savings and benefit analysis on the 4 schools in that area should be undertaken prior to any decision making on a single school.</p>	<p>relate to the closure proposals of Bryn Hafren. Today we are not discussing the potential merger of Llandysilio and Bryn Hafren.</p> <p>As plans are progressed and options and costings explored for what could be achieved, what the model would look like for Llandysilio, Carreghoffa and Arddleen.</p> <p>There would be a balance between what a small school could offer in terms of learner entitlement, where the main challenges were currently in the Llanfyllin catchment. The Council was under significant financial pressure, there was acknowledgement from the Strategy in 2020 that there are too many small schools in the county.</p> <p>Action was required where the main challenges were first. The overall position would be costed, there could be a number of options for the area mentioned, with difficulties arising that are currently unforeseen.</p> <p>This proposal was not necessarily about the financial cost saving, but about the learner entitlement and equity within the Llanfyllin area. There were issues in relation to surplus places, workloads of staff and leaders in the smaller schools to lead on all areas of the curriculum. There was value in the economy of scale regarding learner wellbeing, emotional support and the additional ALN pressures that was being felt within the system.</p>
<p>There is a Welsh medium Ti a Fi, but no continuation of the provision in the area, under the future plans assurance sought that there would be Welsh medium education within the current catchment of the 4 grouped schools, and the Llansantffraid and Llanfechain area.</p>	<p>Currently there was no follow-on Welsh medium education from the Ti a Fi into Cylch or early years primary provision, within the 4 schools group. There was a recommendation within the papers that options are to be explored along the A483 corridor. There was no mention within this paper of improving the Welsh medium provision in the Llansantffraid and Llanfechain, however those discussions could be held as the programme was progressed.</p>

<p>There have been comments made of a desire for Welsh medium education for individuals from Shropshire.</p>	<p>The distance from Oswestry to what was termed the A483 corridor schools, was no greater than the distances Powys learners currently travel for Welsh medium education. One of the options coming forward, probably during the consultation phase, if the Ysgol Bro Cynllaith proposal goes forward, would be to exploit a similar opportunity in that area.</p> <p>There would be a site in the north-east corner of Powys where the Council needs to bring forward Welsh medium provision. There are many issues to be discussed prior to any firm proposal for Welsh medium education being tabled.</p>
<p>Clarification sought on comment that there was a strong commitment to support Welsh children in Shropshire to receive a Welsh medium education, would this be funded by PCC.</p> <p>There have been no formal plans developed therefore presumptuous at best for this to be highlighted. The only formal plan presented would do great harm to the Welsh language on the border, proposed school closures could leave nearest schools would be in Oswestry, could confirmation be given that Powys would finance and transport pupils to their nearest suitable school in Shropshire should they so desire to attend there.</p>	<p>We are at the very early stages of exploring opportunities of the Marches Partnership offer. Learners of Powys are transferred cross border, which would allow for more detailed discussions on how this was managed with the view to have reciprocal arrangements in place.</p> <p>In respect of Ysgol Bro Cynllaith, it was quite simple as naming Llanrhaeadr ym Mochnant as the receiving school, any other schools chosen, would come under parental choice.</p>
<p>The Chair requested clarification on would Powys transport to nearest school, Bryn Hafren families have stated they would attend a school in Shropshire, likewise Ysgol Bro Cynllaith families stated Trefonnon as the preferred option, which Authority would incur costs.</p>	<p>The Council currently provides home to school transport in line with the policy. If eligible for free home to school transport it would be to your closest or catchment school.</p> <p>In the case of a named receiving school, the Council in the past has provided transport to a named receiving school, even if it was not their closest school, for the period of time that for the pupils of that closing school.</p> <p>The Council's wish was to keep all Powys learners in Powys and have the entitlement to the Welsh curriculum and the Welsh language.</p>
<p>The previous Cabinet issued a report to understand the impact of the border on</p>	<p>The review of border schools was not continued for a number of reason</p>

<p>Welsh medium education etc., has this report been finalised and published.</p>	<p>which included officer workload. The decision made was that border issues would be considered every time a catchment or school were reviewed.</p>
<p>There has to be consistency through the transformation programme, Scrutiny would like to revisit previous decisions on border schools, to examine if consistent in our policy to treat all schools equally.</p>	
<p>Bryn Hafren has increased links with the Welsh language as have a Welsh speaking teacher and all pupils are participating in the Urdd this year. Those links will be lost if parents who are employed in Shropshire transport those children on their commute rather than to a school in Powys a number of miles in the opposite direction.</p>	
<p>Has the suggestion of smaller schools coming under the management of a larger Urdd school been dismissed as not reflected in the report. Officers would have been aware of the option that had emerged at those school discussions to build on progress made, yet surprised there appears no consideration of such in the report shared given comment by the Head of Service that learner entitlement is a priority. Concern raised that all options should have been included at the commencement of the programme, as progression made non-viable options removed rather than adding options as consultation is progressed.</p>	<p>No, this was an option that emerged during discussions with the schools concerned as a proposal discussed but not fully quantified and brought forward for further evaluation. As part of the consultation exercise those schools could bring those proposals forward. The learner entitlement element required further exploration. Officers were not confident the information was sufficient to progress to offer a similar learning entitlement to the proposals outlined in the papers. This was the start point, there would be a consultation process where more detail and discussion will be raised, prior to any final decisions being made. To clarify the approach to optioning, the 3 schools specific circumstances have been reviewed along with their nearest schools, i.e., Ysgol Bro Cynllaith the options are linked with Llanrhaeadr, one option was to merge, another to come under the governance of Llanrhaeadr as a second site.</p>
<p>The maintenance backlog for one of the receiving schools was noted as £400k would the maintenance be completed within the 12-month window. It is imperative to have a clear timeline of investment in schools.</p>	<p>The Council has a duty to support, maintain and improve the condition of its buildings regardless of any school reorganisation progress. The backlog at Llanfechain has been recognised and would be a priority</p>

<p>Comment made that the figure for building maintenance backlogs was tantamount to a catastrophic failure, which needed to be addressed urgently, there has to be a clear concise plan for how to progress.</p>	<p>under the Schools Major Improvement Programme. Given the potential for a new build for Llanfechain / Llansantffraid, the pupils who attend Llanfechain school would have as good a learning environment as possible.</p>
<p>The Impact Assessments are very reliant on new builds, if new builds do not materialise the Impact Assessment should be changed.</p>	
<p>There was mention of Ysgol Llanrhaeadr ym Mochnant moving along the Welsh language continuum, which was essential, were the Governing Body in favour to move at pace.</p>	<p>In relation to Ysgol Llanrhaeadr ym Mochnant there had been difficulties in the recruitment of a Head Teacher. There have been very positive discussions with the Governing Body in regard to the Welsh language. The current ratio was 50:50, which would result in a lot of work to move the along the language continuum, in previous schools the ratios have been far greater in favour of the Welsh language at the statutory consultation stage.</p>
<p>Ysgol Llanfyllin has requested to move organically along the spectrum, with staff working hard to encourage more learners into the Welsh medium stream. Would there be an option for logic and reason to be used or any devise other than majoritarianism for the decision to be advanced.</p>	<p>The main issue was consent, The Council would not want to create situation where there was resentment and tension. In Ysgol Rhiw Bechan there has been a steady migration toward Welsh medium which would eventually lead to a transfer. There needs to be more work undertaken to understand reasons for parents choosing an English medium education and for them to be supported to change opinion. Where there were concerns of inability to support children through a Welsh medium education, programmes from Mentor Iaith for English speaking parents could assist. In keeping with proposals within the WESP, Llanrhaeadr would commence active progression along the continuum with a view to becoming a Welsh medium school, possibly over 2 sites with Ysgol Pennant, with one Head Teacher by the end of the 9-year programme.</p>
<p>How much support was there from the Council for the TROCHI scheme as</p>	<p>A key priority for Officers was to ensure there was a legacy following</p>

<p>fundamental to the progression of the Welsh language in our schools. The suggestion from Llanfyllin High School has been that a TROCHI experience be offered to Yr. 6 learners in the last half term to allow them to join a TROCHI stream in Yr.'s. 7 -8, could the school anticipate support particularly of a financial nature from Powys.</p>	<p>the Urdd Eisteddfod next year.</p> <p>Aware of the successful TROCHI pilot in Llanfyllin, the Schools Service have a team around the Welsh Language that can support. Have also been successful in recruiting on a secondment a part-time Welsh medium SIA to support our Welsh medium schools.</p> <p>At the Head Teacher development group, it has been shared that the Urdd was a springboard for further development of the Welsh language.</p>
<p>What lessons have we learned from the schools already moved or moving along the Welsh medium continuum, which could be used to inform parents of other areas, how has the transition been monitored and evaluated to feed into future situations. Do we use feedback effectively from parents, whose children have moved into a Welsh medium education.</p>	<p>There needs to be a period of engagement and dialogue with schools to ensure the schools and Governing Bodies are supportive of transition. To make clear to families what the benefits were of a Welsh medium education, and to commence from a very young age with a clear pathway of educational progression.</p> <p>Evidence was available from Bro Hyddgen, where numbers have not dropped since the move from dual stream to Welsh medium the support and monitoring from the Schools Service has continued.</p> <p>Utilising feedback from parents who have had children move along the Welsh medium continuum was something upon which we could improve.</p>
<p>The Chair invited Cllr Graham Breeze to voice local Member comment. The Portfolio Holder and Head of Schools Service were informed of the disappointment to the complete lack of consideration given to engagement from Welshpool High School in this Llanfyllin, North Welshpool Catchment Area Transformation programme, particularly as some of the schools noted in the reports, and at this meeting were in the Welshpool High School catchment area. Portfolio Holder was requested that if any changes were to be made to the Welshpool High School catchment area that the School and Governing body were to be fully consulted with detailed evidence of impact on school</p>	<p>As move forward exploring catchment areas, very aware that Carreghoffa, Llandysilio and Arddleen are in different catchment areas. In addition, if they do merge in the future the impact on feeder High Schools would have to be understood as well as the impact on numbers.</p> <p>The documentation provided outlines awareness of impact on both Welshpool and Llanfyllin High Schools should there be a changes of catchment for these 3 schools. Opportunities could present themselves should the schools merge, exploration of split High Schools catchments would be one of</p>

<p>numbers, loss, or gain, made available.</p>	<p>them.</p> <p>Assurance given that Welshpool HS would be part of the 3 schools consultation discussions, should there be an exploration of options.</p>
<p>Chair requested that the schools catchment maps and the school transport policy would have to be updated to be aligned with the proposals presented.</p>	
<p>Was the cost per pupil in the reports based on current funding formula or the actual cost per pupil.</p> <p>Within the SWOT analysis, specifically weaknesses and threats and how these would be addressed, there was no mention of flooding which can adversely affect the Bryn Hafren area for a number of weeks per annum.</p>	<p>The cost per pupil was derived from the Section 52 report for the 2022-23 financial year.</p>
<p>With previous transformation reports Committee had been given data in respect of pupil flow which has assisted to understand the demography of an area.</p> <p>The Impact Assessment has a reliance on new builds, these IA's should be removed as irrelevant, through discussion today 2 cohorts of Primary School children would have progressed to High School before new builds are realised.</p>	
<p>Committee requested more detail on the inclusion of Ysgol Meifod, as it had been stated consideration would be given following a new build at Ysgol Llanfyllin.</p>	<p>Every year there was opportunity for schools to request or opt for a catchment change, via the admissions process. Ysgol Meifod requested a change of catchment to Llanfyllin in 2021-22. The Transformation programme has highlighted that in the medium timeframe (Yr4-6) there would be a requirement to review the relationship for Ysgol Meifod, currently classed as a sustainable standalone school, therefore no immediate action was required.</p>
<p>Committee had advocated for pace of transformation, from reports and discussions, it must be noted that minimal change would occur in the term of this Council.</p>	

Scrutiny made the following observations:

- The Committee requested that:
 - Assurance be given that pupils displaced, due to closures of small schools, would not be subject to further moves as the Transformation programme progressed. It would be less disruptive if planned changes all happened as one.
 - Clarification of the projected future numbers data included new builds, and that the information would be provided to the Scrutiny Committee.
 - That schools are not closed prior to proper consideration given of capital investment programmes.
 - Lessons learned from previous schools moved on the Welsh Medium Continuum, that the monitoring and evaluation information be shared with parents, learners, and schools to assist with future transitions.
 - Information be provided to the Scrutiny Committee on all subjects taught through the Medium of Welsh and English from Yr7 to Yr13 in every school, and that this be made available to parents and learners at the commencement of every academic year.
 - A clear timeline of investment in schools be made available.
 - Assurances be given for the provision and commitment for Cylch and Ti a Fi in the catchment area, to promote the early years learning through the medium of Welsh.

- The Committee remained unconvinced about:
 - The delay in commencement of the Llanfyllin Catchment Review and required the differences in outline from the October 2020 paper be highlighted.
 - The SWOT analysis provided, as it does not take into consideration the extensive flooding that occurs in the Bryn Hafren area.
 - The provision of clear data, to understand the pupil flow, the whole geography of an area must be understood.
 - The actual pace of transformation.

- The Committee expressed concern:
 - That this process had not given a sufficient timeframe for all issues to be addressed, nor for all Local Members to be appraised of documents to provide adequate response to parents, staff, and learners alike.
 - That all reference to Capital expenditure has been removed. It is important for Members to be made aware of the timeframe and when investment will be made, to provide our communities with clarity of plans and commitment by the Local Authority.
 - Due to the catastrophic backlog in maintenance projects, can Cabinet provide assurance that pupils will not be moved from a closed school to a school that has a lower condition grading.
 - That the Impact Assessment provided was reliant on new build projects. In reality 2 cohorts of Primary School children could have progressed through their education before new builds were completed, therefore the Impact Assessment would be deemed irrelevant.
 - That the Transport Policy is not in line with the Transformation programme, for example cross-border issues. There has to be consistency and equity within our policy for all schools.

- Border schools need to have consistent transport policy across Powys, one that is not detrimental to Welsh Medium education. The Committee are unclear of School transport costs of transporting learners across the border.
- There were no timescales for the pace of transformation programmes, recorded within any of the document provided, which is essential to keep members parents and schools informed.
- If school closures are to happen, where and what is the capacity of other schools within the catchment area to receive these learners.
- That the school transport policy was not in line with the proposal documents and catchment area maps.
- New builds discussed need to have the capacity to deal with the proposals within the documents.
- Needs more information to local members, realise the impact on other schools in the catchment area.
- Of the lack of clarity within the proposals before the Committee of what the ultimate ambition is for Education within Powys.

Scrutiny's Recommendations to Cabinet were that:

- 1 The impact assessment provided was reliant on new build projects. In reality 2 cohorts of Primary School children could have progressed through their education before new builds were completed, therefore the Impact Assessment would be deemed irrelevant.
- 2 The border schools need to have consistent transport policy across Powys, one that is not detrimental to Welsh Medium education. The Committee are unclear of School transport costs of transporting learners across borders.
- 3 If school closures are to happen, what and where is the capacity of other schools within the catchment area?
- 4 The Committee require a response for the delay in commencement of the Llanfyllin Catchment Review and requested the differences in outline from the October 2020 paper be highlighted.
- 5 The process had not given a sufficient timeframe for all issues to be addressed, nor for all Local Members to be appraised of documents to provide adequate response to parents, staff, and learners alike.
- 6 Due to the catastrophic backlog in maintenance projects, can Cabinet provide assurance that pupils will not be moved from a closed school to a school that has a lower condition grading.
- 7 The school transport policy was not in line with the proposal documents and catchment area maps. There has to be consistency and equity within our policy for all Powys schools.
- 8 All reference to Capital expenditure has been removed. It is important for Members to be made aware of the timeframe and when investment will be made, to provide our communities with clarity of plans and commitment by the Local Authority.
- 9 That any new build would be required to have the capacity to deal with the proposals noted within the documents.
- 10 There were no timescales for the pace of transformation programmes, recorded within any of the documents provided, which is essential to keep Members, Governing Bodies, parents, and schools informed.

11 Of the lack of clarity within the proposals before the Committee and of what the ultimate ambition is for Education within Powys

7. | SCHOOLS TRANSFORMATION - YSGOL BRO CAEREINION

Background: -

Precis provided by the Portfolio Holder.

Officers gave a brief introduction to the proposal and referred to the following documents available to the Committee throughout the discussion:

- Cabinet Paper: Ysgol Bro Caereinion
- Appendix A – Option appraisal Ysgol Bro Caereinion Language
- Appendix B – Ysgol Bro Caereinion Impact Assessment

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
Chair highlighted that the papers on Bro Caereinion were a Proposal and therefore require significant scrutiny by the Committee	
<p>Following the letter of July 2023 that Bro Caereinion move along the move along the Welsh medium continuum in the near future. The pace has come as taken the Governing body and school by surprise with disappointment expressed of the lack of communication. Letter from the Governors requested the Primary phased reception intake completed initially, then 2 years later the Secondary phased intake. The Portfolio Holder met with Llanfyllin & Meifod and formally invited to meet Governors.</p> <p>The ambition for Bro Caereinion to become a Welsh language medium school is welcomed by the Governing body.</p> <p>In relation to the impact assessment (IA) (Pg4) referred to the proposal of a phased basis which minimised the impact on current pupils, citing impact was neutral. Given the approach would be Primary and Secondary phases completed concurrently was the impact assessment outcome still neutral.</p>	<p>It will remain as a neutral impact as additional support would be input via the Trochi for Yr. 7 pupils, as the area of most concern.</p> <p>Bro Caereinion has 21 pupils and Ysgol Rhiw Bechan 28 pupils who would be impacted by the transition into Welsh medium.</p> <p>The IA's provided were draft, as progress through the consultation period and beyond, documents would be updated.</p>
When will the Trochi commence, there would be no point as of 1 st Sept 2025, the Authority needs to give every learner impacted the opportunity to be emersed in the language, in addition teachers may wish to take a sabbatical to learn and become proficient in Welsh.	<p>The Trochi needs to commence as soon as possible, as would any teacher sabbaticals required.</p> <p>Trochi has been reactive to pupils that have requested the service.</p> <p>The Trochi system would be required</p>

	<p>to adapt to become more proactive and supportive development. If the proposal achieved agreement, Trochi would have to be implemented prior to the Sept. 2025 date. The Service was currently recruiting to increase the offer, to allow need to be focussed where required</p>
<p>It was good to hear Ysgol Bro Caereinion was to move along the Welsh medium continuum. However, clarity required for pupils e.g., Ysgol Rhiw Bechan, which has 10 pupils in each Yrs. 4-6. If the learner or parents, who lived closer to Ysgol Bro Caereinion than Newtown but did not want a Welsh language education, would that learner have the right to have free transport to Newtown High School to receive an English medium education.</p>	<p>The learner would have entitlement to free transport for Welsh medium education even if not the closest high school. However, a learner would not be entitled to transport to an English-medium school if the Welsh medium school were nearest and the catchment school. Home transport does not differentiate between Welsh medium schools or dual stream schools. If a learner lived in Tregynon free home to school transport to Newtown would not be an entitlement as closest school was Bro Caereinion regardless of language. When the Transport policy was consulted upon and implemented, the English and Welsh provision across the County was not equitable. The policy in place was deliberate to try and access the bilingual offer at fewer settings across the County. In agreement that as the transformation proposals are progressed, the Transport policy would be continually reviewed, to close the gap in equitable provision as per commitment to the WESP. The plan would be to establish the school, then the transport policy could be updated and aligned.</p>
<p>Cllr Heulwen Hulme, Local Member comment was read out by the Chair: <i>People and families have moved to Tregynon because it is a dual stream school with pupils then naturally transitioning to Caereinion High School dual stream school. That is a choice parents have made to ensure their children continue to enjoy and embrace their education journey. With the proposal in front of us today, I can</i></p>	<p>In terms of Ysgol Rhiw Bechan, Ysgol Bro Caereinion, Ysgol Dafydd Llwyd, Ysgol Gwmraeg Y Trallwng the pupil numbers are significantly in favour of a Welsh medium education, which must be noted as both an opportunity and a success for the County. The Service does not underestimate the scope for change going forward would be considerable, however, outweighed by the benefits of a</p>

<p><i>assure you parents do not want to re-direct their English stream children from Caereinion H S to Newtown H S because</i></p> <p><i>1. They are rural kids, they are country kids, they feel more protected, and they have built-up long-lasting friendships from the reception class upwards. This is also seen as dividing families up, whereby 1 child in the Welsh stream and 1 child in the English stream but potentially going to different schools.</i></p> <p><i>I am also hearing of parents looking to move their English stream children from Ysgol Rhiw Bechan (YRB) to Berriew so that they go to Welshpool H S as against Newtown H S. I genuinely believe that YRB will lose numbers in the English stream which will impact on class sizes. They already have 3-year groups in one class due to low English numbers. This is not the way forward.</i></p> <p><i>Parents feel this decision is being forced upon them and please remember Welsh is not for every child. I know of 1 pupil who has switched from the Welsh to the English stream now this September, his mum reports he is a much happier and is a much more talkative child, something that has been lacking because he was struggling in the Welsh stream.</i></p> <p><i>Finally, I am aware YRB is in the Caereinion Cluster group, and I do have grave concerns that if this proposal goes forward, what will the impact be on YRB and will it remain a dual stream school.</i></p>	<p>bilingual education.</p> <p>Issues and concerns of families are appreciated, and the school and Service will continue to work with families to allay fears, if and as the proposal was progressed.</p>
<p>The terminology of Welsh and English medium should cease, as they were not of equivalent provision.</p> <p>Proposed the use of Bilingual Outcome/ Welsh Medium (BOWM) and English Monolingual Only (EMO) education.</p> <p>Learners of BOWM education have as good a command of the English language as anywhere else in the County, and the terminology would assist in providing an explanation to the public of the expected learner language outcomes.</p> <p>The difference of provision in a dual stream to a BOWM school is huge. If Welsh medium was chosen in a dual stream school, not all subjects are taught through Welsh, this is not communicated to</p>	<p>The provision of Welsh medium education and the offer of Welsh medium education was just that. The proposal opens up opportunities for partnerships between schools with a Welsh medium offering to work together and share resource and workforce.</p> <p>Another key area in the proposal allows for a fully bilingual workforce rather than a mix and match. The main issue was having the workforce, which currently was spread thinly. The WESP strand on workforce development has to be addressed across all phases.</p> <p>The proposal would strengthen the</p>

parents.

Committee must insist that Schools provide an audit of the lessons and resources that are offered and actually provided through the medium of Welsh.

The proposed move of Bro Caereinion at pace on the Welsh Language Continuum, has simplified and eliminated the problem as to the delivery expectations of learners and families.

There were no incentives for the dual stream Schools Management to explain clearly to parents the level of Welsh Medium education learners were or would be in receipt of. Parents need to be informed in summer terms what lessons were to be undertaken through the medium of Welsh for the upcoming academic year. History has shown that parents have been persuaded to attend certain dual stream schools because their child would learn Welsh. The actual outcome where budget was the driving force, was a disaster for Welsh medium education.

How many Dafydd Llwyd learners have moved to Secondary provision at Llanidloes rather than Ysgol Bro Caereinion as was intended to receive a more all-round Welsh Medium education.

Welsh medium offer across the North of the County, have listened to parents on the learner disadvantage of having no direct transition to Welsh Medium Secondary provision from Primary.

In terms of the curriculum offer the Service can capture the information provide evidence. Schools tend to work on their curriculum offer from April to July, and need to be mindful that external providers are utilised, which has to be explored around equity and the S-Goal.

Information on subject provision sits with schools not centrally, the Service receives information on the outcomes at KS4 &5. Agreement there was need to work with schools on communication support for KS4 options.

The proposal was implementing the WESP. The important aspect was the richness of the offer that our children would finish their education with both languages. The Organisation has a duty to ensure that the proposal was successful should it be agreed and taken forward so as not to collectively let down not to be let down another cohort of learners unable to access Welsh medium education across the whole curriculum.

In respect of the Welsh Medium Education Forum, they were *supportive of the proposal to change Ysgol Bro Caereinion's language medium. This is a long overdue development which has been discussed for several years and will ensure access to a full Welsh medium Secondary education for pupils in this part of Powys, enabling the Council to meet one of the main objectives of its WESP. This development would provide a clear pathway through Welsh medium education for pupils in the area from nursery through to Secondary and Post 16 provision. Welsh pre-school provision is already available at the Cylch Meithrin, and*

the Cylch Ti a Fi is also available for parents and young children. The Forum would expect this to lead to an overall growth in numbers choosing Welsh medium education in the area and a growth in the numbers continuing to receive when transferring to Secondary phase in particular. The Forum supports the proposal to start introducing the change in the language provision in the Primary and Secondary phases at the same time, which would enable the school to move along the continuum more quickly. This will ensure that access to a complete Welsh medium Secondary education can be provided earlier than if the proposal was only introduced in the Primary phase.

Some points were suggested that would need to be considered as the proposal moved forward: -

- *More information on the immersion support offer through TROCHI*
- *Whilst acknowledged the change of language provision to Welsh medium from September 2025. Welsh medium education should be promoted in the area in the lead up, with learners to be encouraged to take up Welsh medium education from September 2024.*
- *Form strong relationships with other Welsh medium schools in the area, particularly Ysgol Dafydd Llwyd and Ysgol Gymraeg Y Trallwyng. To encourage pupils from these schools to transfer to Secondary provision at Ysgol Bro Caereinion.*
- *The Council will need to revisit the transport policy to support the development to ensure the policy encourages access to full Welsh medium provision.*
- *It would be necessary to work with parents to make sure*

	<p><i>there was support for the development, particularly parents who had hoped there would be a Secondary development in the Severn Valley Area.</i></p> <ul style="list-style-type: none"> • <i>Collaboration between Ysgol Bro Caereinion and Ysgol Bro Hyddgen should be encouraged to enable both schools to expand the opportunities for pupils and to overcome difficulties with recruitment.</i> • <i>Any capital required to ensure the schools success would need to be considered when preparing the Council Strategic Outline Programme (SOP) for the WG 9-year Sustainable Communities for Learning investment programme, over the coming months.</i> <p>The provision of the breadth of offer in both language mediums. A piece of work has begun which includes the allocation of hours, the language of delivery as well as the workforce. The Service is really aware of the resilience within the workforce and risk in relation to delivery of Welsh medium subjects. The collaboration noted by the Welsh Medium Education Forum would help in building the resilience within the system.</p>
<p>The Options Appraisal Pg 14 showed numbers of learners within the catchment area. The numbers at Dafydd Llwyd are very good, yet the transition to Bro Caereinion does not equate. There remains a frustration that those learners then move to a dual stream school soon switch streams to English medium provision through Yrs. 7-9. Was there a plan to revisit the catchment area.</p>	<p>Ysgol Dafydd Llwyd has dual catchment as both Secondary schools were technically of the same language category. This proposal if approved would give rise to a statutory change, with catchments being revisited, as the language medium would be a materially differentiating factor.</p> <p>Dafydd Llwyd for a number of years had transitioned to Caereinion. In more recent years there has been a change where pupils have transitioned to a number of schools</p>

	<p>including Llanidloes and Newtown. Also, Ysgol Gwmraeg Y Trallwyng transition to Bro Caereinion and to Welshpool High School.</p> <p>Unless there were clear pathways to a dedicated Welsh medium provision that pattern would continue.</p> <p>Information will be made available prior to Cabinet next week.</p> <p>For Bro Caereinion to be successful the Authority needs to maximise the number of pupils transitioning and for Bro Caereinion to be the provider of choice</p> <p>The Primary feeder schools numbers to Bro Caereinion stand at 671. 105 taught through the English medium. 566 through the Welsh medium.</p>
<p>Would Ysgol Bro Caereinion have to close as dual stream and re-open as a Welsh Medium school.</p>	<p>No, the school would not have to close and re-open as proposal was to transition along a phased approach.</p>
<p>When the transport policy is updated, it would be important to have recognised the difference in experience between BOWM in a dual stream school as compared to Welsh medium setting, as would theoretically open doors for the furthest areas of the north of the county to allow those learners a fair experience. The downside would be the length of time being transported, or settle for the bi-lingual option provided by Llanfyllin or Llanidloes High Schools</p> <p>It was incredibly important that the education provision through the Welsh medium were to be improved radically in Llanfyllin and Llanidloes. For the number of children currently in Welsh medium Secondary education, there are sufficient teachers within the County, just spread between schools. How would the cooperation between school be envisaged, would there be the potential of central contracts i.e., Welsh medium North Powys employed over 3 sites, through the use of technology undertaking remote teaching.</p>	<p>The cooperation between schools and how this would be progressed requires further exploration. Once the service has gathered the information previously requested by Scrutiny, the expertise across the Authority could be reviewed. Powys remains a leader in the e-Ysgol with exploration being undertaken at provision of the offer at Key Stage 4.</p>
<p>Bro Caereinion if proposal approved would be set up as a BOWM school. What is the danger to Bro Caereinion's sustainability if Llanfyllin and Llanidloes High Schools</p>	<p>There would be greater ambition than one Welsh medium Secondary school in the county. If Bro Caereinion were successful, delivering on the Councils</p>

<p>develop their Welsh Medium offer. Would there be a possibility for Bro Caereinion to be re-categorised as a North Montgomeryshire Welsh medium provider with responsibility for the Welsh medium provision over Llanfyllin and Llanidloes to ensure a fairer deal. This model would enable Welsh medium education to be geographically dissipated to ensure it is not constrained to Bro Caereinion with easy accessibility from Llangurig to Llansilin.</p>	<p>commitment to the WESP, the outcome should be increased demand to warrant additional schools over and above the current WESP.</p>
<p>In order for Bro Caereinion remain sustainable, the catchment of Ysgol Dafydd Llwyd to be wholly within that of Ysgol Bro Caereinion would be changed by the Authority. There was still concern that cohort after cohort would continue to be let down, the ambition of the Portfolio Holder was acknowledged this needs to be added to the WESP which could be updated at any point. Many of Powys' schools are on the edges of sustainability what was the footprint of Powys High Schools, currently there are on 13 sites are all sites sustainable going forward.</p>	<p>Catchment would be revisited once the moved proposal, if approved by Cabinet, was progressed. With regard the school footprint, a number of issues are being reviewed. The current policy remains at 13 sites. As in a review on Welsh Medium provision and the impact upon the WESP and wider section. There would be impact on the use of schools as to where learners attend for English medium education. No changes planned for the 13 sited provision. There was ongoing work to review and look at the financial positions which could inform changes, any changes however would require cross party working. No timeframe given in regard to any review on the 13 sites as have current proposals to progress.</p>
<p>Has any consideration been given to an awareness campaign aligned with the proposal to demonstrate the benefits of Welsh medium education, using evidence from previous learners to parents.</p>	<p>Officers have been requested to produce an engagement and activity plan around the Urdd Eisteddfod, to promote the benefits of Welsh medium education across North Powys. As the proposal moves forward there would have to be specific targeted events within the catchment to assist parents understanding of all the opportunities available. There is a link on the Powys website Destination Bilingual, commitment made to promote and run that campaign again in light of comments made.</p>
<p>There was no forward capital expenditure information within the documentation, is there capital investment planned.</p>	<p>The new programme will be submitted early spring 2024. One of the criteria for the new Sustainable Communities</p>

	<p>for Learning programme from WG was the development of Welsh medium education. It was acknowledged that Bro Caereinion requires investment and would be looked at as the capital programme was prepared.</p>
<p>Communication was crucial, it has to be clear comprehensive and timely. Bro Caereinion was subject to major upheaval when the All through school was established. If the proposal is approved, the Portfolio Holder and officers were invited to meet with and collaborate with the school and Governing body.</p>	

Scrutiny made the following observations:

- The Committee welcomed:
 - That the Governing Body were in favour of the move along the Welsh Medium continuum.

- The Committee requested that:
 - The Portfolio Holder arrange to meet with the Governing Body in the near future.
 - The intake for the Secondary phase be extended from 2025 to 2027, to allow for the progression of English medium students both in Ysgol Bro Caereinion and feeder schools. This would align with the governing body request to allow more time for learners and staff to adjust along the Welsh Medium continuum.
 - Clarity be provided whether the plan was for Ysgol Rhiw Bechan to move along the Welsh language continuum.
 - Clarity for those feeder schools where pupils are taught through the medium of English, which high school would they receive free transport to.
 - An audit be undertaken of the number of lessons and resources provided through the medium of Welsh in dual stream schools. Parents also to be informed when timetables are formulated.
 - Information be provided to Scrutiny Committee of the number of learners from Dafydd Llwyd that cease their education through the medium of Welsh and it what year i.e., Yr.7, Yr. 9, Yr. 12.
 - The catchment secondary school for Dafydd Llwyd be reviewed as Bro Caereinion would be the only Welsh Medium High School in Northeast Powys.
 - The Local Authority review and explore the possibility of having central contracts for Welsh Medium teachers, allowing for further utilisation of technology and remote teaching techniques, as vitally important that the Welsh Medium education provision in Powys is improved dramatically.

- The Committee remained unconvinced about:

- The scheduled commencement of the TROCHI support in September 2025, should be implemented as soon as possible, to allow every learner and staff member to be immersed in the language at the earliest opportunity.
 - The Local Authority's ability to sustain and maintain 13 high school sites across Powys.
 - That the necessary Officer and financial support would be implemented in a timely manner to support this unique journey for North Powys and Bro Caereinion.
- The Committee expressed concern:
 - That there was no capital expenditure information available to Committee, to attract learners, schools have to be in receipt of capital investment, for maintenance and building requirements to attain and sustain flagship status.
 - Of the sustainability of Bro Caereinion if Llanfyllin and Llanidloes develop their offer of Welsh Medium Education in the future.
 - The school transport policy was not in line with the proposal documents and catchment area maps. There has to be consistency and equity within our policy for all Powys schools.

Scrutiny's Recommendations to Cabinet were that:

- 1 The scheduled commencement of the TROCHI support in September 2025, should be implemented as soon as possible, to allow every learner and staff member to be immersed in the Welsh language at the earliest opportunity.
- 2 The school transport policy was not in line with the transformation documents and catchment area. There has to be consistency and equity within our policy for all Powys schools.
- 3 There was no capital expenditure information available to the Committee. To attract learners, schools have to be in receipt of capital investment, for maintenance and building requirements to attain and sustain flagship status.
- 4 That the necessary support would be implemented in a timely manner to support this unique journey for North Powys and Bro Caereinion.
- 5 The sustainability of Bro Caereinion, if Llanfyllin and Llanidloes develop their offer of Welsh Medium Education in the future, be secured.
- 6 The catchment secondary school for Dafydd Llwyd be reviewed as Bro Caereinion would be the only Welsh Medium High School in Northeast Powys.

8. WORK PROGRAMME

To be discussed at the next meeting.

**County Councillor
R G Thomas (Chair)**

Public Document Pack

Learning and Skills Scrutiny Committee Tuesday, 17 October 2023

MINUTES OF A MEETING OF THE LEARNING AND SKILLS SCRUTINY COMMITTEE HELD BY ZOOM ON TUESDAY, 17 OCTOBER 2023

PRESENT

County Councillor Gwynfor Thomas – Chair

County Councillor – G D Jones Vice Chair, A W Davies, B Davies, D Meredith, G Morgan, G Preston, L Roberts

Co-opted Members – K. Chedgzoy, M Evitts, S Davies

Cabinet portfolio Holders in Attendance:

P. Roberts for a Learning Powys, D. Thomas for Finance and Corporate Transformation

Officers: Marianne Evans, Eurig Towns, Jim Swabey, Sarah Astley, Nancy Owen, Emma Palmer Director of Corporate Transformation.

Others in Attendance Cllrs - P Lewington, J Jones and A B Davies.

1. APOLOGIES

Apologies for absence were received from

County Councillor Danny Bebb

Lynette Lovell – Director of Education and Children Services

Georgie Bevan – Head of Schools Service

Sarah Quibell – Service Manager for Education Support Service

2. DISCLOSURES OF INTEREST

There were no declarations of interest from Members relating to items for consideration on the agenda.

3. DECLARATIONS OF PARTY WHIP

The Committee did not receive any disclosures of prohibited party whips which a Member has been given in relation to the meeting in accordance with Section 78(3) of the Local Government Measure 2011.

4. SCHOOLS TRANSFORMATION - NEWTOWN SCHOOLS REVIEW

Background:

In September 2021 the Council merged Ladywell Green Infants and Hafren Junior schools to form Ysgol Calon y Dderwen. A Strategic Outline Plan (SOP) has been developed submitted to Cabinet and WG to build a new 300 or 300+ place primary school on the site in conjunction with the North Powys Well-being Hub campus. There has since been an informal engagement exercise with the Treowen and Maesyrrhandir schools and Ysgol Calon y Dderwen.

In conclusion following the engagement exercise and the options appraisal recommendation to Cabinet was that: -

Approval given to commence the formal statutory process on the following proposal.

- To close Treowen CP School from 31.08.2025
- To extend Ysgol Calon y Dderwen to include the former Treowen CP School site from 01.09.2025 and run as a 2-site school until new build completed.

The second phase would be for

- Ysgol Calon y Dderwen to move to a new building, located on the existing site during 2026/27
- Treowen site would close.

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
<p>The Committee requested a plan for the whole of the Newtown schools area as concern raised of possible multiple future changes causing disruption to and impacting on our learners.</p>	<p>There are 7 Primary schools within a 2–3-mile radius in Newtown. Transformation reviewed the Newtown area a number of years ago and progressed with the Hafren and Ladywell Green merger. Since then, Maesyrrhandir and Treowen numbers have significantly decreased which is predicted to continue. The wider plan for Newtown, due to the lack of available land to build or transform, would have to happen on a phased basis. There is a mix of different types of schools within the town, Welsh medium, English Medium, and the only Catholic school in the County.</p>
<p>Concern also raised in terms of whether the funding had been secured for the North Powys Wellbeing. What risk was there to the plans for Calon Y Dderwen if the rest of the development did not go ahead, how confident is the Authority that the project can be capital funded.</p>	<p>In terms of the Wellbeing campus, the Authority continues to work in partnership with PTHB on a cohesive critical path for an integrated master plan. Capital funding for the school element, as increased in size, cost inevitably increase. There would have to be a revised SOC (Strategic Outline Case) submitted to WG incorporating a different scope of school and a different level of funding. If the funding within the current BAND B programme was not available, the project would have to be submitted into the rolling 9-year Sustainable Communities for Learning programme prior to March 2024.</p>
<p>The Council has been in talks with WG for 7-8 years, for the development to be progressed, firm answers are required as</p>	<p>The uncertainty on the North Powys Wellbeing project causes intense frustration. The proposals allow the</p>

<p>blighting the development for schools in Newtown.</p> <p>Maesyrrhandir has 95 pupils, the buildings condition is not great, the pupils deserve equitable facilities for their education. If the current plan are progressed what would happen to Maesyrrhandir</p> <p>There are 286 empty places within Newtown, a higher number than the capacity of most of the primary schools in Newtown. Committee request a clear plan for the whole of Newtown, to assess if the capital investment within schools is targeted at the right place. The fear is potentially schools like Maesyrrhandir would be left behind.</p> <p>St Mary's has 54 vacant spaces within a 107-capacity setting, yet focus was on other schools under the transformation programme.</p> <p>The North Powys Wellbeing hub would form part of the re-generation of the area which can only be supported if WG funding can be secured.</p>	<p>opportunity to expand, should WG decide that North Powys Wellbeing project is not to be funded.</p> <p>There is concern of Maesyrrhandir being left behind, additional investment in the building was required, it was highlighted that staff were in discussions on sharing facilities at Ysgol Cedewain when it opens later this year.</p> <p>There were difficulties in re-organising or transforming schools within the catchment, due to a mix in classification of church and state schools. This case is complicated further as St Mary's is the only Catholic school in the county and is currently sustainable. Penygloddfa has been over capacity in recent years, this would not have made any significant impact on the exceptionally large capacity issue within Newtown. The proposal was the best solution to meet the educational needs of pupils within the southern half of Newtown.</p>
<p>The leaflets disseminated by the Portfolio Holder containing comments by Cabinet Members have given the impression that the Cabinet has already drawn its conclusions, would this be an appropriate way consult with the community.</p> <p>In regard to the sustainability of schools, the smallest school in Newtown would still continue and stand alone, whilst the proposed merger is between larger schools.</p>	<p>The other Cabinet Member is the local Member and is entitled to make representations to and ask question of his electorate.</p> <p>Time has been spent with the schools community speaking to Governors and headteachers to understand the concerns of the community.</p> <p>Many of these schools numbers have declined, which in turn would prove difficult to maintain Head Teacher role without a high teaching contact and the consequential impact on their wellbeing.</p> <p>These are schools with moderately high Free School Meals (FSM) and Additional Learning Needs (ALN), which within the ALNET Act places additional burden on the SLT & ALNCO.</p> <p>The Authority has a significant challenge maintaining number of Head teachers with the additional administrative load. A benefit of a merger into a larger school would allow for the expansion of the SLT and diversity of the supporting team.</p>

	<p>Under the Schools Organisational Code, the Authority has a responsibility to protect religious diversity, and as the only Roman Catholic school in Powys, makes it all the more challenging when it comes to making changes. At this point it would be hard to justify closing, when there were other better opportunities for alteration within Newtown.</p> <p>A forward plan for Newtown was difficult to put forward, due to the issue of predetermination and constrained by legalities.</p> <p>The rationale for the review of Newtown schools was to rationalise the number of schools through a phased programme. Examine if the plans for Calon y Dderwen could be increased with the benefits of a new building on a constrained site, for more pupils than originally planned. If the Authority had had access to the whole site, there would have been a different option proposed.</p>
<p>During consultations previously we have been informed that figures have an impact on the decision. Given the proposal put forward, leads to questions as to why has this decision been made.</p> <p>Cost per pupil numbers there was about £800 difference, huge difference in the projected figures and the condition of the buildings.</p> <p>55% of the vacant spaces are noted in Maesyrrhandir.</p>	<p>A key consideration was that Treowen School has a similar pupil profile to Ysgol Calon Dderwen, in terms of FSM & ALN.</p> <p>Maesyrrhandir has a significant difference with FSM profile at 56% and ALN profile at 47%.</p> <p>Treowen School has a FSM profile at 42% and ALN profile at 19%.</p> <p>Calon y Dderwen has a FSM profile at 36% and ALN profile at 24%.</p> <p>Another factor was which school the pupils attend. Approximately 90% of the pupils at Maesyrrhandir attend as the closest school, 60% at Treowen School and 11% at Calon y Dderwen.</p> <p>Further contributory factors were that Treowen school does not currently have a substantive Head Teacher in place, whilst the Maesyrrhandir Head Teacher was on secondment to another school.</p>
<p>Has consideration been given, within the process, to the financial implications required to maintain and bring the condition of Maesyrrhandir school up to date.</p>	<p>On paper there would be examination of the surplus places and building condition.</p> <p>The Service is aware of the significant maintenance requirement at</p>

	<p>Maesyrrhandir, a condition survey has been commissioned. As part of the major improvements programme investment would be planned over the next 5-10 years.</p> <p>There are significant surplus places at Maesyrrhandir, a reflection that historically it was a very large school. The question to be asked would be how was the space within the school utilised, as affected the capacity calculation. As progress was made the capacity at Maesyrrhandir would be reviewed, could areas be re-used which could reduce the surplus places.</p>
<p>One of the main reasons given for there not being a Welsh medium Secondary school in Newtown was the lack of capacity. Clearly as almost 300 primary places were vacant with further vacant places in the High School, capacity was not an issue.</p> <p>Other Committee members have requested the plan for Newtown, whilst appreciate it would be difficult to address all areas simultaneously, visibility on the long-term direction was required, especially to provide all-through Welsh Medium Education, given the Authority was using the third version of WESP in 7 years.</p>	<p>There is a lack of space rather than capacity in Newtown. In order to have a new all-through Welsh medium school there would have to be space to build the facilities required for the Secondary element.</p>
<p>Point made for an all through Welsh medium school in Newtown was crucial for the development of the Welsh language.</p> <p>Calon y Dderwen requires a new build as the current fabric of the school is not good enough to facilitate the children's education. However, is the proposed school site in the most appropriate place for the majority of the children who would be attending. Assurance sought that other options had been reviewed which could provide improved pedestrian and vehicular access.</p>	<p>The availability of land within Newtown was a key issue. Various sites had been considered within and outside of Newtown, with decision made that Calon y Dderwen was sited in a central location.</p> <p>With regard to access, following the significant number of concerns raised on the engagement visits and noted in the engagement reports, of congestion in a central part of town. During the build design process, there is a key requirement by WG that Active Travel must be considered with safe routes to school.</p>
<p>Chair noted that local member comment was very important, comments were not in the papers before Scrutiny, which was difficult as required their expert knowledge when discussing various areas of Powys.</p>	<p>In response to point raised of the Treowen school site if it were to be closed. There was an assumption it would become a derelict site. Options would need to be reviewed for what the building could be used for as an</p>

Comment made by Local Member Cllr Joy Jones.

Residents were very concerned with regard to the congestion and safe active travel routes for the current Calon y Dderwen site. These issues could be exacerbated with the proposed North Powys Well-being Hub.

There had been little dialogue with the communities and the reasons for merging one school over another had pitted communities against each other.

There has been no real consideration given to the regeneration of the Treowen School site should the school close.

The engagement process received 101 responses from Treowen families with only 9 positive responses.

Concern raised of staff well-being due to the uncertainty of the proposed merger would they begin to look for new roles elsewhere.

Comment made from Cllr Pete Lewington:

In agreement with many points made by Cllr Joy, in particular the traffic, parking and safety concerns raised about active travel routes. The engagement responses have very few positive comments whether from teachers, Governors, or pupils with similar recurring themes against the merger. The comments should be taken on board and communities listened to.

Treowen would lose its unique identity and education provision within the community.

There were no clear reasons mentioned in the proposal as to why Treowen and not Maesyrrhandir should be put forward for closure except for the current pupil profiling which was a snapshot in time which could alter and did not provide a sound basis for decisions made.

The poorer building condition of Maesyrrhandir must be noted together with the cost per pupil higher, than that of Treowen.

Concern was highlighted that in the proposal Maesyrrhandir pupils would not be in receipt of the benefits of a new modern learning environment.

Within the papers Option 3 was stated as not potentially achievable, yet Option 4

asset for the community i.e., a Family Centre, Early Years, Flying Start provision, 3+. Setting.

In respect of highways work was already underway as part of the Campus development on modelling traffic flows, counting traffic and understanding how the traffic would support the integrated site.

<p>was, request made to clarify why that conclusion was reached.</p>	
<p>Would pupils in the Treowen catchment be entitled to free home to school transport.</p> <p>What playing field provision would there be if the new school was to be built on the existing playing field.</p> <p>Where were current pupils coming from who attended Calon y Dderwen, only 11% were within catchment. Opportunities noted for apprenticeships.</p> <p>Would Calon y Dderwen incur additional staffing costs until Treowen site closed.</p> <p>In respect of the wellbeing of staff, there was no mention in the documentation of the views of Ysgol Calon y Dderwen would this process add further stress and anxiety to staff who had recently been through the merger of Ladywell Green and Hafren.</p>	<p>It would be unlikely that pupils would be entitled to free home to school transport as would live under the 2-mile threshold criteria.</p> <p>Existing playing fields provided an open piece of land which allowed for easy development and reduced need for temporary buildings. The existing school building will be repurposed to playing fields.</p> <p>Apprenticeships refers to potential during the new build.</p> <p>The budget share would be for one school across 2 sites initially. Then becoming one school which would have to consider the needs of staff. The one Head Teacher over the 2 sites would reduce some of the costs. It was hoped there would be limited impact of restructuring.</p> <p>If this were an opening of a new school pressure and anxiety would have an impact. Calon y Dderwen extending and incorporating Treowen would not necessarily put staff through that process again.</p>
<p>How long would Calon y Dderwen be without playing fields whilst development was progressed.</p> <p>There appeared to be a fine balance between Options 3 & 4 on the appraisal document which required further clarification.</p> <p>In hindsight, the community could have benefitted from the information on active routes and design of the new school prior to consultation process to give more confidence and faith in the process.</p>	<p>There would be a year for the pitch to be formed and seeded until it could be played, dependent on the season. In the interim, the school would have access to 2 multi use games areas.</p> <p>The options rationale was related to the similar pupil profile and leadership arrangements. There was work being undertaken on the whole campus with master planning and various consultants involved on the critical pathway.</p>
<p>The Standards of Education report by Estyn for Maesyrrhandir school, clarity sought on the number of N/A's reported</p>	<p>In Wales there were no longer judgement on categories. Previous reports cannot be compared. There were no issues with the quality of education provision at Maesyrrhandir.</p>

Scrutiny made the following observations:

- The Committee requested that:

- That a Powys-wide vision document be made available to all stakeholders to inform of the direction of travel for the whole schools transformation programme.
- Further work be undertaken on the long-term sustainability, including the equality of provision and the high number of vacant places, of schools in Newtown prior to decision and implementation of plans.
- The Committee remained unconvinced about
 - Using the North Powys Wellbeing Hub as an argument for merging Treowen CP School into an extended Calon y Dderwen campus, given that the associated funding from WG for this significant development to take place, has not been secured.
 - Whether the site for Ysgol Calon y Dderwen is the best site for a new school, considering that only 11% of pupils currently live within catchment. In addition, has exploration of any other potential site been undertaken.
 - The rationale behind schools with smaller numbers not being considered within the current transformation programme.
 - Plans for the future potential use of the Treowen school site if the school were to close.
- The Committee expressed concern:
 - Of the large number of available places (286) within Newtown schools, Committee cannot see a justification for building a new school.
 - That the proposals as set out, could potentially leave Maesyrrhandir CP School, in terms of maintenance and educational attainment in a modern learning environment, far behind other schools in the town.
 - Of there being no solid basis provided within the reports for a merger of Treowen CP School over Maesyrrhandir CP School with Ysgol Calon y Dderwen, other than similar pupil profiling through FSM (Free School Meals) and ALN (Additional Learning Needs).
 - Of the access to Calon Y Dderwen, the traffic congestion in the area, active travel routes for children across busy main roads.

Scrutiny Committee's recommendations to Cabinet were that:

1. Assurance be urgently sought from WG in respect of secured funding for the North Powys Wellbeing Hub and subsequent extended build at Ysgol Calon y Dderwen.
2. Assurance be given that the Cabinet will urgently address the high vacant places within schools in Newtown.
3. Assurance sought for the dissemination to stakeholders of clear transport plans, given the current level of traffic congestion around Ysgol Calon y Dderwen, prior to any decision being made.
4. The long-term sustainability of all schools in Newtown to be considered in the current plans, including the rationale behind schools with smaller numbers not being considered within the current transformation programme.
5. The vision for the delivery of education in Newtown, and the whole of Powys, to be shared with all stakeholders.
6. Assurance be given of equity of educational provision across all schools.

7. Clarity is sought on the future potential use of the site.

5. SCHOOLS TRANSFORMATION - IRFON VALLEY CP SCHOOL

Background

The Governing Body contacted the Schools Services with concerns relating to a recent drop in pupil numbers and the impact on the financial stability. It was explained that a review process would be undertaken. It was stated that the Governing Body were not part of the review process nor part of the recommendation before Scrutiny Committee today.

There has been a sudden decline in pupil numbers with the main reason cited as being no afterschool provision.

Recommendation to be made to Cabinet:

To proceed to formal consultation to close Irfon Valley CP School as of the 31st August 2024 and for pupils to transfer to their nearest alternative schools.

Points raised by the Panel:	Responses received from Officers or Cabinet Members.
<p>It would appear that local transferring in schools are either at capacity or near to, limiting the choice of schools for those pupils of Irfon Valley to transfer to, what would be the distance that pupils from Newbridge would have to travel to Builth or Dolafon.</p>	<p>Do not have actual distances to hand but in terms of admissions if the pupils were closest to Newbridge, application for a place could be submitted if availability, they would be allocated a place, with home to school transport provided if the closest school.</p> <p>Currently more than half of the pupils at Irfon Valley are closest to Dolafon but would have to wait until parents have made their decision.</p> <p>Currently there are 44 spaces in Builth Wells CP School available across the Welsh and English mediums.</p>
<p>2 pupils are closest to Newbridge which is currently oversubscribed, would the Admissions Team be flexible in their approach, or would there be the expectation that those 2 pupils would be transported elsewhere.</p> <p>What were the expected additional costs of school transport for those pupils who have already left Irfon Valley CP School and could be in receipt of that entitlement in the future, notwithstanding that pupils could be transported in possibly 3 different directions.</p>	<p>Estimated transport costs based on pupils transferring to their closest schools.</p>
<p>Does the £46k for school transport take into consideration those children that have</p>	<p>When the transport costs were modelled it would have been on the</p>

<p>already left Irfon Vally CP School who could become eligible for free Home to School transport, but who are not currently eligible.</p>	<p>number of learners in the school at that time. Will confirm to Committee when the modelling took place and numbers of children involved. Confirm this is the case – number of pupils at the school in September 2023</p>
<p>Free School Meals (FSM) currently is at 17.6% has this figure increased significantly since half of the pupils have transferred elsewhere.</p>	<p>The reason for the increase was due to there being less pupils within the school. Pupils who did not have FSM have transferred leaving those pupils in receipt of FSM. The reduction in numbers was due to parental choice rather than deprivation in any way.</p>
<p>Confirmation sought that the Safeguarding recommendations made by Estyn had been complied with and addressed, where these factor in the reduction in numbers.</p>	<p>The Safeguarding recommendation from Estyn had been addressed within the first few months. There were no concerns of the quality of education taking place inside the school, parents are not citing any reason other than after school provision for moving their child's school, friendship groups have then moved alongside</p>
<p>Cllr A.B Davies invited by the Chair to comment as Local Member. Comments made by the officers are correct the lack of afterschool provision has been the main concern. There were no concerns with the Leadership nor quality of education provided at the school. The Welsh medium school in Builth has taken a number of the Irfon Valley learners. Pleased to note that the Scrutiny Committee are giving due diligence to the report which in turn has provided confidence in the process. Chair commented that it was always important to have views from the Local Member (s) when discussing subject matter as sensitive and important to communities.</p>	
<p>Clarity raised over the potential use of the site, tis there a co-dependency between a village hall to the school and the income the village hall can derive from the school. There would appear to be a difference in approach between town and rural areas, the earlier discussion on Newtown schools listed possibilities, but there would appear a lack of opportunities and service delivery in a more rural community.</p>	<p>Cllr A.B. Davies advised that the village hall was completely separate to the school. The Service would follow the normal process for declaring properties surplus, i.e., discussions with the Community Council, options for Council services to utilise the space, then the option for capital receipts via the open market for sale.</p>

Scrutiny made the following observations:

- The Committee noted:
 - The concerns from the Governing Body to the Schools Service to look into the recent fall in numbers and the impact on the financial sustainability of Irfon Valley CP School.
 - That the Governing Body were not part of the review process, nor did they have any involvement in any decisions that have been made.
 - And were supportive of the consultation process proceeding in regard to the potential closure of Irfon Valley CP School.
 - That the previous safeguarding recommendations from Estyn relating to Health and Safety matters had been addressed.
 - There were no concerns of the quality of education provision or management standards at Irfon Valley CP School, with reason given for falling numbers was the lack of afterschool provision.

- The Committee requested that:
 - The Admissions Teams be flexible in their approach when dealing with any potential resettlement of pupils and when considering home to school transport.
 - That a Powys-wide vision document be made available to the to inform of the direction of travel for the whole schools transformation programme.

- The Committee remained unconvinced about
 - The future potential use of the site, given the lack of service delivery and opportunities in the more rural areas of the county.

- The Committee expressed concern:
 - Regarding the admissions policy and request this be reviewed at the earliest opportunity.
 - The cost of transport within the report at £46k, was this in relation to all pupils or the current number of 19 remaining in the school.

Scrutiny Committee's recommendations to Cabinet were that:

1. Assurance that the admissions policy will be flexible and reviewed at the earliest opportunity.
2. Clarity is sought in relation to the transport costs held within the report.
3. Clarity is sought on the future potential use of the site.

6. WORK PROGRAMME

Post 16 Education to be brought forward from June 2024.
Schools causing Concern December 2023 under Estyn Reports.

County Councillor R G Thomas (Chair)

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CYNGOR SIR POWYS COUNTY COUNCIL.**CABINET EXECUTIVE****16 January 2024**

REPORT AUTHOR: County Councillor Pete Roberts
Cabinet Member for a Learning Powys

County Councillor David Thomas
Cabinet Member for Finance and Corporate
Transformation

REPORT TITLE: School Delegated Budget Funding Formula Review

REPORT FOR: Decision

1. Purpose

- 1.1. To inform members of the responses received to the consultation and to recommend changes to the School Funding Formula for mainstream Primary, Secondary and All-age Schools.

2. Background

- 2.1. It is good practice to maintain a rolling programme of review of the school funding formula. The priority areas for formula review in 2023 were:
- Review the distribution of ALN funding to all Mainstream schools;
 - Review how the formulae take account of factors related to deprivation and disadvantage; and
 - Review of distribution of funding for premises, including utilities.
- 2.2. The School Funding (Wales) Regulations 2010 require that the authority consults with the governing bodies of all its schools and with the Schools' Forum on any changes to the school funding formula.
- 2.3. A Formula Review Group was established in 2023 with a range of stakeholders, including headteachers and chairs of governors from each school sector, along with Council officers. The group has met on two occasions, in July and September 2023 to review the existing formulae, before developing a set of proposals for Primary, Secondary and All age schools.
- 2.4. Between meetings, officers undertook detailed work on the areas for review and proposals to be considered, bringing that work back to the FRG for discussion. Comparisons with funding formulae from other Welsh authorities were also undertaken.

- 2.5. Schools were consulted on the proposed changes over four weeks between 7 November to 1 December 2023.
- 2.6. The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:
- Create a **more equitable provision for all learners** across Powys
 - **Support the aspirations of the transformation programme**
 - **Support all learners** including helping **offset the effects of disadvantage**
 - **Support a collaborative schools' community** which offers effective professional learning to facilitate the self improving system.
 - **Support inclusion and bilingualism, and promote access to excellence for all learners.**
- 2.7. The proposals are intended to support the distribution of funding to every Primary, Secondary and All age school in Powys. The allocation of funding within the school remains a matter for the headteacher and the Governing Body within the quantum delegated to them and the regulations that apply to the local management of schools.

3. Consultation Proposals

Amending the Notional ALN funding: Primary, Secondary Phase Mainstream Schools

- 3.1. The current mainstream primary phase formula allocates the notional ALN funding (totalling £1 million) to mainstream primary schools and the primary phases of all age schools based on the following proxy indicators using three-year averages of the current academic year and the previous 2 years.
- Learners on the Special Educational Needs (SEN) / ALN Register (80% / £800,000)
 - Learners entitled to Free School Meals (eFSM) (20% / £200,000)
- 3.2. The current secondary phase formula allocates notional ALN on the following bases:
- ALN Lump sum – 1 full time equivalent (FTE) Additional Learning Needs Coordinator (ALNCo) and 1 FTE pastoral teaching assistant (TA) support, totalling £1.2m . There are no proposals to change this element of the secondary phase formula.
 - “First class of 15” funding includes £1.536 million of notional ALN funding – each year group in each stream and on each site that has 16 or more learners is funded for an initial teacher-learner ratio of 1 FTE teacher to 15 learners. It does not take account of the number of learners with ALN or eligible for FSM and does not differentiate between them. The total funding distributed through this element of the formula amounts to £3.007 million, of which £1.536 million was the notional ALN funding used to fund the “First class of 15” and £1.471 million was general schools delegated funding, including disadvantaged learners.

- 3.3. Some learners with ALN also draw in band-led funding, provided to the school to supplement formula funding. This is drawn from the “ALN Retained” budget which totals £1.670 million.
- 3.4. In addition to the Notional ALN funding for primary schools with specialist centres, the learners in those centres are included within their overall learner numbers at a rate of 50% to allow for re-integration. This is not the case for secondary phase schools with specialist centres.
- 3.5. By changing the methodology for distributing notional ALN funding to schools and delegating the majority of funds, there are benefits for all stakeholders and the potential to reduce the long term societal and financial costs associated with learners who may struggle without early intervention and consequent proper support.
- 3.6. The distribution mechanism for notional ALN in the primary and secondary formulae need to be aligned and based on the same proxy indicators to ensure equity for all and a continuum of support across their educational career. Aligning primary and secondary funding formulae and basing them on the same proxy indicators can offer several advantages:
- Equity: It will promote a more equitable distribution of resources, ensuring that both primary and secondary schools receive funding based on similar criteria, which can be used to target the specific needs of learners, reducing disparity in quality and level of support. Schools that have high levels of learners with ALN will receive higher levels of funding, irrespective of which phase of education the learners are in to enable them to provide the necessary interventions and support
 - Consistency: Using the same proxy indicators for both phases of education creates a consistent and transparent funding system, making it easier for headteachers to understand and manage resources.
 - Targeted Support: Common proxy indicators can help identify specific needs across a learners’/cohort's entire educational journey, allowing for more targeted support and interventions throughout a learners’ schooling.
 - Efficiency: Aligning funding formulas simplifies administrative processes leading to more efficient resource allocation.
 - Accountability: A consistent approach to funding can enhance accountability as it becomes easier to evaluate the effectiveness and impact of investments in ALN resources based on common indicators.
 - Learner Transitions: When funding is aligned, the transition from primary to secondary education can be smoother for ALN learners, as the same criteria are used to allocate resources and enabling resources to ‘transfer’ with a learner, wherever they go.
 - Local Autonomy: It allows schools to have more control over their budget, enabling them to tailor support and resources specific to the needs of their ALN learners.

- Empowerment: It enables school leaders and staff to make decisions that benefit their ALN learners in their school to ensure learners receive the right support to reach their full potential.
 - Staff retention could be improved as longer-term contracts could be offered to staff instead of short, fixed term contracts giving stability within the workforce.
- 3.7. The authority is keen to move to using the new categories of ALN as the basis for distributing the notional funding for ALN in the mainstream school funding formulae. It is also keen to increase the amount delegated through the mainstream formulae at the start of the financial year and to minimise the ALN retained budget. It is anticipated that this will reduce the administrative burden on schools' staff and on authority officers of the current PIP or ERP processes. It will also give headteachers greater flexibility in how they utilise resources to meet the specific needs of their learner demographic.
- 3.8. **It is proposed** that the ALN retained budget be reduced to £300,000 per annum, which would only be available to provide funding to new complex presentations of ALN, whether through a learner being new to a Powys school or a learner suffering a life-changing event / illness. This budget would also be expected to provide funding to Special Schools for any learner number adjustments required at the start of each academic year.
- 3.9. **It is proposed** that of the following funding streams:
- The remaining £1.370 million of the ALN retained budget (which also currently provide band-led funding to schools); plus
 - The £0.800 million delegated through the notional ALN element of the current mainstream primary phase formula; (this equates to the total £1.000 million less the £0.200 million currently distributed on the basis of free school meal eligibility); plus
 - the £1.536 million ALN funding currently delegated through the “First class of 15” element of the mainstream secondary phase formula be pooled to provide a total of £3.706 million to be distributed as notional ALN funding to all mainstream schools.
- 3.10. **It is proposed** that the total of £3.706 million notional ALN funding for mainstream schools is distributed to schools based on the number of learners each mainstream school has in each of the new categories of ALN, namely ULP, School IDP and LA IDP. **It is further proposed** that this would no longer be supplemented by additional band-led funding.
- 3.11. **It is proposed that** this data would be extracted from the TYFU system on the same date as the locally agreed date for the learner count date, i.e. the first Friday following the Autumn half-term (also known as the “November count date”).

- 3.12. In order to ensure that the funding distributed in this way does not exceed the £3.706 million available, it is necessary to be able to measure each category in relation to one another to establish a relationship between each category, which should equate to the differing levels of additional support needed for each category. **It is proposed** that each category is expressed as a “ULP equivalent”. The ratios to be applied to the model are set out in the Consultation document.
- 3.13. **It is also proposed** that where there are existing one-off arrangements for specific funding agreements with individual schools, these continue. In these circumstances a learner will have had a statement of special educational need for a significant time, and as a result may have had resources attached to a specific element of the statement. It would be unreasonable to immediately remove this. However, when the learner's statement of special educational need is converted to an IDP, it will be reviewed to determine whether it is still required. If the new proposal is accepted and implemented it is anticipated that the delegated funds will adequately replace previous funding agreements.
- 3.14. **It is proposed** that there is an adjustment to the learner numbers for secondary schools for 50% of the learners registered in the secondary phase specialist centres.
- 3.15. In order to minimise the risk of inconsistency between schools / clusters across Powys, **it is proposed** that ALN officers will undertake a thorough, systematic and careful quality assurance process as set out in Section 4.5.4 of the consultation document.

Revising the teaching and learning top ups: mainstream secondary phase schools

- 3.16. The current methodology for teaching and learning top ups in the secondary phase formula includes the “First class of 15” funding which would be removed if the proposed amendments to distributing notional ALN funding are agreed. This means that the teaching and learning top ups in the mainstream secondary phase formula need to be recalculated, to remove this element of funding or this will unfairly disadvantage those schools that do not receive teaching and learning top ups.
- 3.17. **It is proposed** that the top ups for individual schools, language streams or campuses with fewer than 600 learners will now be calculated as set out in the tables in the consultation document for years 7-9 (table 3) and for years 10 and 11 (table 4).

Disadvantaged Learners – Primary and Secondary Phase schools

- 3.18. The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based

on the incidence of social deprivation among pupils registered at all such schools”.

- 3.19. For the purposes of funding distribution, it is considered that this funding is provided to support all disadvantaged learners regardless of their socio-economic background.
- 3.20. This is addressed in the current mainstream primary phase formula by distributing £200,000 across all mainstream primary settings based on the three-year average number of eFSM at each school.
- 3.21. The current methodology through the mainstream primary phase formula provides the same amount per learner eligible for eFSM, regardless of the overall proportion of the school’s population that is eligible for eFSM.
- 3.22. It is noted that currently there is no equivalent allocation for mainstream secondary settings. Instead, in the secondary phase formula, each school receives an amount to cover the cost of the free school meals provided, which could not be used to support disadvantaged learners (the funding for this was included within the 1:15 funding). In 2022-23, £298,573 was allocated to secondary phase schools in relation to this. Secondary schools will continue to receive an amount to cover the cost of the free school meals provided.
- 3.23. Powys County Council is ‘work[ing] to tackle poverty’ in order ‘to deliver better outcomes for those who experience inequality and socio-economic disadvantage’.
- 3.24. When considering school spend and empirical evidence, the “Review of School Spending in Wales” in 2020 noted that ‘a 10% increase in spending has been found to improve education and later life earning by about 7-10%’. These effects are larger for disadvantaged learners.
- 3.25. The Review also recognised that ‘[t]here is a strong empirical evidence base showing that higher school spending has a larger, positive effect on learners from deprived backgrounds and can play a major role in reducing the attainment gap. As a result, the Review stated that ‘local authorities should therefore prioritise extra funding for deprivation’.
- 3.26. The impact of the covid pandemic and the cost-of-living crisis on learners and their families is recognised nationally, regionally and locally. To enable our schools to support disadvantaged learners we are proposing that funding is redistributed equitably across all phases based on the eFSM eligibility indicator.
- 3.27. **It is proposed** that a multiplier is used to increase the weighting of the eFSM indicator as the proportion of the school population that is eligible for eFSM increases, as set out in the table 5 of the consultation document.

Premises element of funding formulae – Primary and Secondary Phase schools

- 3.28. The current formula methodology for premises funding is based on a standard rate per square metre (SQM) for all mainstream and special schools, as shown in the extracts from the current formula descriptions and in section 7.1.1 of the consultation document. The current formula do not take account of whether the school hosts a school kitchen.
- 3.29. Energy costs have experienced significant inflationary increases, but these have not been uniform, either in terms of scale or timing, across the different fuel types currently used by schools for heating fuel. This has resulted in the standard amount per square metre not reflecting the differences in schools' relative need to spend, depending on their main fuel type used for heating.
- 3.30. Schools have also raised concerns about the impact that hosting working kitchens is having on their budget positions.
- 3.31. **It is proposed** that the funding rate per square metre for grounds and premises is revised to exclude utility costs and any additional costs associated with hosting a working kitchen. This new rate would be the standard premises funding that applies to all schools.
- $\text{Sqm of school} \times \text{base rate per sqm (excluding utilities)} = \text{standard premises funding}$.
- 3.32. **It is further proposed** that a utility specific rate per square metre is used to provide funding for schools based on the main fuel used for heating.
- $\text{Sqm of school} \times \text{utility specific rate per sqm} = \text{utilities related funding}$
- 3.33. In addition to this, **it is proposed** that a utility top-up is applied to schools with working kitchens based on a rate per SQM of the kitchen areas.
- $\text{Sqm of kitchen area} \times \text{applicable top up rate per sqm} = \text{Kitchen top up}$

Proposed Implementation

- 3.34. Changes to a distribution method will cause changes to individual schools' total funding, and there can be a risk of significant re-distribution if the proposed changes are significantly different from the existing distribution methodology. How this is managed is key to a school being able to ensure continuity and smooth transitioning for the staff and learners. Should a school need to make staffing reductions as a result of the redistribution, then sufficient time needs to be allowed to the appropriate processes to take place.
- 3.35. **It is proposed** that the implementation of the proposed formula is staggered over 2 years to mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the proposed changes for the distribution of funding is phased as follows:
- Year 1 = 50% new formula, 50% current formula

- Year 2 = 100% new formula

Please note the timing and pace of proposed implementation may change depending on the outcome of wider budget discussions.

4. Responses to the Consultation

4.1. 15 responses to the consultation (13 of which were schools)¹, which is just under 15% of the 86 maintained schools in Powys (analysed by sector below, alongside the number of schools actively engaged in the formula review process during 2023). Each response is set out in detail in Appendix B along with officers' comments to any narrative responses.

School Sector	Number of schools	Consultation responses*	Represented on Formula Review Group (FRG)*	Represented on Schools Forum*	Total
Primary	72	11	3	5	19
Secondary	8	1	3	2	6
All-Age	3	1			1
Special	3	0	2		2
Unknown		1			1
Schools Forum		1			1
Total	86	15	8	7	30

* Each school is only included once in the table above – If schools represented on the FRG or on Schools Forum responded to the consultation, they are not included in the FRG or SBF numbers. If any schools are on both FRG and Schools' Forum, and did not respond then they are only included within the FRG numbers.

In addition, all Chairs of Governors and headteachers were invited to a meeting with the Head of Education on the 29 November 2023, in which the proposals were presented in full. The Head of Finance (Section 151 Officer) was also in attendance at the meeting.

Amending the Notional ALN funding: Primary, Secondary Phase Mainstream Schools (Questions 4 – 12)

¹ 13 schools responded to the previous consultation in Autumn 2022, equating to 15% of schools.

- 4.2. 13 responses were received in respect of Q4 and whether the secondary phase “First Class of 15” adequately reflects the variance in characteristics of learner cohorts, and therefore the relative level of ALN support required in secondary phase schools. Of the 13 that responded 8 were Neutral and 5 Agreed/Strongly agreed. There were 4 responses to the narrative question in relation to the “First Class of 15” which are set out in Appendix B.
- 4.3. Questions 6 and 7 related to maximising the delegation of ALN funding. There were 13 responses, 10 agreed / strongly agreed, with 2 neutral and 1 disagree. There were 9 responses to the narrative question.
- 4.4. Questions 8, 9 and 10 related to basing the distribution of notional ALN funding on the number of learners in ULP, School IDP and LA IDP categories, when the data should be extracted and the relative weightings of each category. Overall, the responses to questions 8 – 10 were a mixture of supportive (in the main) and neutral responses, with 3 disagreeing / strongly disagreeing with using the new categories (Q8), 1 disagreeing with extracting the data on November Count Date, in line with the pupil number data extraction (Q9) and 3 disagreeing with the ratios for the 3 categories (Q10). The narrative responses to question 12 (set out in Appendix B provide further context for the unsupportive responses in particular. The main element of concern related to whether the funding provided would support full time 1:1 support for a learner with ALN.
- 4.5. Question 11 related to extending the adjustment made to pupil numbers in the mainstream secondary phase of a school for 50% of the learners attending a specialist centre attached to a school, as is currently the case for primary schools with specialist centres. This allows for reintegration into mainstream classes.
- 4.6. The view of officers is that the formula proposals should be implemented as proposed.

Revising the teaching and learning top ups: mainstream secondary phase schools

- 4.7. Of the 12 responses received for question 13 **all** were either neutral (8) or agreed (4) with the revised teaching and learning top ups.
- 4.8. The view of officers is that the amendment should proceed as proposed.

Disadvantaged Learners – Primary and Secondary Phase schools

- 4.9. Respondents were largely supportive of the proposals in relation to amending the formula to place a greater weighting for disadvantaged learners.
- 4.10. Question 15 asked whether to use eFSM eligibility as an indicator within the formula to support disadvantaged learners received 14 responses. 11 agreed/strongly agreed, and 3 disagreed. Those that disagreed were concerned about the robustness of the eFSM indicator in light of Free school

meal roll out. Concerns were also raised about families that experience deprivation but are not eligible for Free School Meals. These are addressed in Appendix B

- 4.11. Question 16 and 17 were over 90% supported/neutral, 13 of 14 agreed that the relative need to spend increases as the proportion of disadvantaged learners in a school increases (Q16). 10 of 14 agreed with multiplier factors set out in the consultation document, 3 were neutral and 2 disagreed.
- 4.12. With the support of respondents, the view of officers is that the proposals should be implemented.

Premises element of funding formulae – Primary and Secondary Phase schools

- 4.13. 13 respondents agreed or strongly agreed with the proposals in relation to the premises element of funding formulae, with 1-2 neutral responses to each question and no disagreement.

Implementation of the proposed formula changes

- 4.14. 12 of 14 responses were in support of the proposed implementation over 2 years of the changes consulted upon. There was a request within some of the responses that modelling is provided as soon as possible.

5. Feedback from Schools Forum

- 5.1. The Schools Forum has been involved from the outset in identifying issues in the formula that needed to be addressed and in working through the options for change. The Forum has now seen the results of the consultation and is pleased to support the recommendations for changes to the formula. The proposed changes will help to ensure that funding will go to where it is needed most and, at the same time, will increase delegation of funding to schools to help address Additional Learning Needs.
- 5.2. However, the Forum is of the view that the Cabinet should be informed, before making a decision, about the impacts these changes will have on different types of school. The Forum did not have this information so does not know which types of school will benefit financially and which will not, e.g. will these changes result in primary schools receiving a greater share of the available funding than is currently the case or dual stream schools doing less well than single stream schools?
- 5.3. In considering this matter the Forum recognised that these proposals do not recommend any real terms increase in the delegated budget for schools. The Forum understands that the Council is facing extreme financial pressures and is endeavouring to protect the level of funding to schools and, in these circumstances, understands why it is necessary for schools to continue to find ways to make existing resources go further. They have, of course, been doing this for many years and will continue to do so.

- 5.4. However, it is important for the Cabinet to note that the funding in the formula to enable schools to meet (i) the additional learning needs of pupils, (ii) the costs of maintaining their buildings/grounds and (iii) their energy costs, has not seen a real-terms increase in recent times. This against a background of well documented increases in the costs of energy and property maintenance and the information provided by schools about the increasing number of pupils with additional learning needs.
- 5.5. The transformation agenda aims to help deal with this by making more effective use of funding in future when there are fewer schools but that will take many years to be fully realised. In the meantime, it is important to recognise that, with the current level of funding, schools will find it increasingly difficult to meet the needs of all their pupils.

6. Resource Implications

- 6.1. Current modelling of the proposed changes to the Mainstream schools' formulae indicates that the changes can be implemented within the current budget envelope. This modelling has been shared with Cabinet prior to decisions being made.
- 6.2. As with any change to a distribution formula, there will be some redistribution between schools as a result of the changes. Phasing in implementation will allow time for schools to plan for these changes in a managed way. The table below summarises the estimated change per sector, the net additional funding is found from the existing ALN budget the authority holds centrally, as set out in the formula consultation.

	Indicative Funding 24-25 as @ Sept 23	Revised Indicative Funding 24-25 after formula changes	Total change in funding	Total Change as % of original indicative funding for 24-25
	£	£	£	%
Primary	38,364,700	38,845,800	481,100	1.25%
Secondary	33,798,900	33,956,600	157,700	0.47%
All-Age	10,785,300	10,561,600	-223,700	-2.07%
	82,948,900	83,364,000	415,100	0.50%

- 6.3 Of the £3.7m highlighted in Section 3.9, £2.3m is already within the formula with a further £0.9m already distributed to schools as band-led funding or previously agreed for unique circumstances, leaving £0.4m of the £1.3m ALN retained currently to be added in.

- 6.4 The Head of Finance (Section 151 Officer) notes the content of the report and can support the recommendation.

7. Legal implications

- 7.1. Legal : The School Funding (Wales) Regulations 2010 set out the requirements of the School Funding Formula. The proposed school funding formula meets the requirements set out in the Regulations.
- 7.2. The Head of Legal and Democratic Services (Monitoring Officer) has commented as follows: " I note the legal comment and support the recommendations

8. Climate change & Nature Implications

- 8.1. The proposals do not have any climate change or nature implications.

9. Data protection

- 9.1. The proposals use pre-existing data that is already processed and managed in line with the Council's data protection procedures.

10. Comment from local member(s)

- 10.1. Not applicable

11. Impact Assessment

- 11.1. The proposed formula and scheme changes will lead to a stable, transparent and fair funding arrangement for Powys learners and schools. The proposed formula changes will create more equitable funding provision for all primary and secondary mainstream schools across Powys, supporting inclusion and all learners regardless of their additional learning needs or disadvantage. Risks to schools with a reduced level of funding will be mitigated by phasing in of the proposals, providing support for schools to reduce their costs and access to the wider "Team around the School" to support them with the transition.

12. Recommendation

- 12.1. It is recommended that:

- 12.1.1. the proposals for the distribution of Notional ALN funding as set out in paragraphs 3.8 to 3.15 are agreed;
- 12.1.2. the amendments to the Teaching and Learning Top ups for Secondary Phase as set out in paragraph 3.17 is agreed;

- 12.1.3. the proposals for distribution of funding for disadvantaged Learners – Primary and Secondary Phase schools as set out in paragraph 3.27 are agreed;
- 12.1.4. the proposals for distribution of the premises elements of the formula as set out in paragraph 3.31 to 3.33 are agreed;
- 12.1.5. the implementation of these changes are phased to mitigate the impact of redistribution between schools as set out in paragraph 3.35;
- 12.1.6. the implementation of these changes be reviewed as part of the Formula Review Group’s ongoing work programme.

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Head of Service:	Georgie Bevan / Jane Thomas
Corporate Director:	Lynette Lovell, Director of Education and Children’s Services

PRIMARY SCHOOLS

Question Ref	Q1 (Name of School:)	Buttington Trewern CP School	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Agree	
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Agree	
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Strongly agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the	Strongly agree	

	first Friday following the Autumn half-term, as agreed locally?)		
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Agree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Agree	
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Agree	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Strongly agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Agree	
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Strongly agree	

	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	From our perspective our whole building operates on a one zone heating system which is not a cost effective mechanism which is therefore not directly comparable to other buildings that can better control their heating use.	Comment noted
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Strongly agree	
	Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)	Two year phasing is manageable.	Comment noted

Question Ref	Q1 (Name of School:)	Ysgol Golwg Y Cwm	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q3 (If no, please provide further information:)		

	<p>Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)</p>	<p>Agree</p>	
	<p>Q5 (Please provide any additional comments you have in relation to the existing “First class of 15” distribution mechanism.)</p>	<p>This is not a fair and equitable system. ALN learners should be funded specifically according to their needs and not by a notional number of pupils within the school.</p>	<p>Comment noted</p>
	<p>Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)</p>	<p>Strongly agree</p>	
	<p>Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)</p>	<p>Delegating the maximum amount of funding whilst retaining the minimum amount of funding for emergencies allows schools to have autonomy over their spending. It allows schools to plan for the provision needed for their pupils and to be flexible in responding to changing needs within their school at any time. Schools can directly address the specific needs of their individual pupils and ensure bespoke packages of provision which will allow best outcomes both educationally and socially and emotionally for these pupils.</p>	<p>Comment noted</p>

	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Strongly agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally?)	Strongly agree	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Strongly agree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Strongly agree	
	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	<p>We feel that this proposal is a far more equitable system which directly meets the needs of individual learners and allows schools to manage provision appropriately in a timely manner. It will allow for schools to be more proactive and less reactive in their planning for all learners with ALN. This system if adopted appears to have benefits with regard to workload for ALNCO's.</p> <p>We feel that taking numbers from the TYFU system will be the most accurate way of collecting data.</p>	Comment noted

	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Strongly agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Strongly agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Strongly agree	
	Q18 (Please provide any additional comments you have in relation to the proposed distribution of funding to support disadvantaged learners.)	We strongly believe that disadvantage learners require additional provision, to ensure equitable outcomes that schools should be duty bound to provide.	Comment noted
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Strongly agree	

	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Strongly agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	Consideration needs to be made for schools with community based provisions which host additional spaces and which are open for the public and multi agency use for 50 week per year.	Each school should have a Lettings Policy which outlines how third parties and community groups are charged for the use of the building. The expectation is that charges are made on a full cost recovery basis.
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Question Ref	Q1 (Name of School:)	Crossgates CP School	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	

	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Strongly agree	
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally)?)	Agree	
	Q10 (Do you agree with the ratios of ULP equivalentents set out in Table 1?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Agree	

	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Strongly agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Question Ref	Q1 (Name of School:)	Llanfaes	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	

	<p>Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)</p>	Disagree	
	<p>Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)</p>	<p>Fraught with issues regarding headteacher level of accountability for support of ALN pupils, issues with movement of pupils between schools in mainstream during a year, level of funding suggested will be insufficient for the needs and will put schools in the insidious position of choosing between children for support. Level of need is higher in schools than ever yet the funding will not be. Fluctuations of need in year need to be catered for - taking data on one day will not facilitate this.</p>	<p>Governing bodies of schools have a responsibility to ensure that provision for learners is adequate to meet the needs of all their learners. With this model, the level of funding for the most complex learners (those with an LA IDP) will be higher than has ever been delegated to schools previously. The model ensures that the funding is provided to the learners, and therefore schools, that have the highest level of need.</p>
	<p>Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)</p>	Disagree	
	<p>Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the</p>	Disagree	

	first Friday following the Autumn half-term, as agreed locally?)		
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Disagree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Agree	
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Neutral	
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Agree	

	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	
	Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)	Schools need to have the proposed changes modelled for their own budgets asap - had this been available perhaps responses would be different?? Fundamentally, we need to remember this is not about figures but about children and people.	All options have been fully modelled, scrutinised and tested by officers on an individual school basis. It is the underlying principle of the changes that is for consultation and schools will be fully supported through the implementation of these should they be approved.

Question Ref	Q1 (Name of School:)	Builth Wells Primary School	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	No	
	Q3 (If no, please provide further information:)	Headteacher only	

	<p>Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)</p>	Neutral	
	<p>Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)</p>	Agree	
	<p>Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)</p>	<p>I agree that it would simplify things to delegate this funding directly to schools but it does depend upon effective systems to monitor and challenge schools on numbers with IDPs. This could prove to be even more involved and time-consuming. ALNCo's don't have time to do all the moderation of other schools that is required and there appears to be no proposal to pay them any additional money for a management responsibility which goes beyond the ALNCo's own school.</p> <p>What happens with children with IDPs who join the school after the funding count or who move onto an IDP during the year?</p> <p>Will schools with specialist centres get the full amount for each pupil with an IDP registered at the centre?</p> <p>Will we be able to access funding for resources other than staffing, especially expensive items such as hoists?</p>	<p>This model proposes delegating the majority of funding to schools, with the council retaining a small amount for those moving into the county that have significant needs or for when a learner suffers a life changing injury or medical condition. There will be no other retained funds and schools will not be able to ‘apply for additional funds’. Any changes to school premises will be considered through the relevant corporate channel. Specialist equipment, such as hoists, will continue to be funded by the appropriate body.</p> <p>A School IDP is a legal document and therefore what is written in this document must be provided. If a learner is stated as having needs that require ALP at a School IDP level, then this must be provided, else this contravenes the ALN Act. The council will provide robust challenge and quality assurance for ensuring that ALN registers are accurate.</p>

		It is important to keep a retained budget but will it be enough and how will schools access this?	<p>The options will be phased in over a two year period. The current model uses a 3 year average of the data and it is proposed that this continues with the new model. As the new model uses a new set of data that has not previously been recorded, a 3 year average will not be available in years one and two but these years will be subject to the phased implementation. A 3 year average will be available from the third year following implementation.</p> <p>A review of the ALN strategy will commence in January; Specialist Centres will be part of that review, and this will include reviewing the funding arrangements.</p>
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally?)	Neutral	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Disagree	

	<p>Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)</p>	Neutral	
	<p>Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)</p>	<p>Concern that the proportion afforded to LA IDPs is not sufficient. This category includes a wide range of ALN some of which can be very expensive to meet need if additional staffing and specialist resources are required. What would be the process for accessing some of the £300,000 retained funding and would we have to reapply each year?</p>	<p>Schools will not be able to access any of the retained emergency funding. At the end of the financial year whatever remains will be fully delegated across all schools through the formula.</p> <p>Currently, when a learner with a statement is 'banded' a mainstream school would usually only have access to funds for a lower level, e.g. between Band 1 to Band 4 (£3k - £8k). This model proposes that all LA IDP learners, whatever, the complexity of need will all receive the higher amount (indicatively modelled at £10k - this may change dependent on future numbers), therefore, schools will receive more funding than previous years.</p>
	<p>Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)</p>	Neutral	
	<p>Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)</p>	Agree	
	<p>Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)</p>	Agree	
	<p>Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of</p>	Agree	

	social deprivation among learners within a school's population?)		
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	I agree in principle but it is hard to say with any certainty without seeing how we would be impacted by this change. Similarly, I agree in principle with the kitchen top up. Our meals are going to be cooked at County Hall. Who will get the kitchen utility top up then? As the take up for free school meals continues to increase with the roll-out, we are needing more kitchen staff to manage this. Has this been factored in as a growing cost?	<p>Comment noted.</p> <p>The kitchen utility top will be payable to the school building in which the meals are prepared and cooked if they are not prepared in a school building then this formula does not apply as this only applies to schools delegated.</p> <p>Kitchen staff are employed by the Catering Team who will ensure there are appropriate staffing levels for the number of meals being provided.</p>
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)

Please can we see some modelling of the new formula in different contexts?

All options have been fully modelled, scrutinised and tested by officers on an individual school basis. It is the underlying principle of the changes that is for consultation and schools will be fully supported through the implementation of these should they be approved. The consultation document provided detail of the ALN and deprivation changes which would enable schools to calculate estimated funding for these areas. The premises element has been modelled but due to the unique circumstances of each school, working examples would not be beneficial due to the complexity of the data behind the calculations.

Question Ref	Q1 (Name of School:)	Guilsfield	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	No	
	Q3 (If no, please provide further information:)	This is the response from the headteacher following the Budget meeting held on 29.11.23 where the elements were explained.	Comment noted

	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Agree	
	Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)	It will give schools more flexibility and enable them to plan support more effectively.	Comment noted
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Strongly disagree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally)?)	Neutral	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Neutral	

	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	The funding attached to LA IDP's may see learners having support drastically cut, £10,000 per learner would not cover half the amount needed for a one to one support. Using more of the ALN funding allocated to the school would impact on the other ALN learners and also relies on there being enough pupils in other criteria to fill the funding gap.	Currently, when a learner with a statement is 'banded' a mainstream school would usually only have access to funds for a lower level, e.g. between Band 1 to Band 4 (£3k - £8k). This model proposes that all LA IDP learners, whatever, the complexity of need will all receive the higher amount (indicatively modelled at £10k - this may change dependent on future numbers), therefore, schools will receive more funding than previous years
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Disagree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Disagree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Neutral	
	Q18 (Please provide any additional comments you have in relation to the proposed distribution of funding to support disadvantaged learners.)	I think there needs to be a base level of funding to provide support and often training for staff, such as RADY and then an element of funding per learner.	Comment noted. If there was a base level of funding, the per learner amount would be reduced. RADY is fully funded by the local authority as part of a three-year programme.

	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Strongly agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Strongly agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	Funding should also look at how we make the buildings more efficient, with a clear timescale of when and how issues would be addressed, such as replacing metal window frames.	Capital works are funded via major improvement funding, which is separate to delegated funding.
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	
	Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)	I think the explanation of the elements should have been at the beginning of the consultation so that everyone was clear on what they were being consulted on. To have that meeting a day before the consultation closed is unfair. It would also be beneficial to have our budget plan modelled to show how these changes actually look, considering I sat through a budget surgery two weeks ago and now the budget will look very different.	As with all formula changes, these proposals are subject to Cabinet approval, and it will not possible to include these changes in individual school budgets in advance of this. When full budget packs are released to schools in the spring term, surgery sessions are held again with all schools to review the positions and provide support to schools to manage any changes to the estimated positions for future years. The consultation document provided detail to enable schools to estimate the funding they would receive for ALN and Deprivation based on their knowledge of their learner population.

Question Ref	Q1 (Name of School:)	Ysgol Bro Tawe	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Agree	
	Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)	Even though we agree with this proposal we are concerned that there will be a lack of funding for in year new arrivals who have significant ALN needs.	The council will retain a small amount of funding for new arrivals moving into the County with significant ALN needs.
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Disagree	

	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally)?)	Neutral	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Disagree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Neutral	
	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	<ul style="list-style-type: none"> - Concerns over LA IDP funding - huge discrepancy in level of need for pupils with LA IDP, e.g: ASD pupil that requires 1:1 funding throughout school day compared to a child that needs academic support in class. -50 x ULP - what does this mean? Will it provide sufficient support for a child with significant needs? - Difference of opinion between schools on what the criteria for ULP / IDP are will determine which schools get the greater funding. - 	Currently, when a learner with a statement is 'banded' a mainstream school would usually only have access to funds for a lower level, e.g. between Band 1 to Band 4 (£3k - £8k). This model proposes that all LA IDP learners, whatever, the complexity of need will all receive the higher amount (indicatively modelled at £10k - this may change dependent on future numbers), therefore, schools will receive more funding than previous years
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Strongly agree	

	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Strongly agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Agree	
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Question Ref	Q1 (Name of School:)	Ysgol Trefonnen	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	

	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally?)	Strongly agree	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Agree	
	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	<p>Provided the information comes off Tyfu and not Teacher Centre which does not currently record ULP, we have no issue with the data being used from the pupil count date.</p> <p>That said we agree with the ratio's in contained within table 1 but we think that where a fulltime or considerably substantial 1:1 is identified this should come with additional figure and the figure quoted of 50x£200 would not be sufficient to cover the costs of a 1:1, meaning other pupils will be left disadvantaged as the school has to cover the cost for pupil safety.</p>	<p>Comment noted.</p> <p>Currently, when a learner with a statement is 'banded' a mainstream school would usually only have access to funds for a lower level, e.g. between Band 1 to Band 4 (£3k - £8k). This model proposes that all LA IDP learners, whatever, the complexity of need will all receive the higher amount (indicatively modelled at £10k - this may change dependent on future numbers), therefore, schools will receive more funding than previous years</p>
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Strongly agree	

	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Strongly agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Strongly agree	
	Q18 (Please provide any additional comments you have in relation to the proposed distribution of funding to support disadvantaged learners.)	<p>Currently this money can be used to support the most vulnerable and disadvantaged pupils, and ideally using the economies of scale by combining ALN and eFSM pupil money to buy-in schemes that support both.</p> <p>Our breakfast club currently is 50% attended by eFSM pupils who are having a better day by having a relaxing morning in breakfast club and not rocking up to the gate at 9, or more likely 9:30, hungry, distressed or stressed.</p> <p>These schemes have substantial impact on pupil wellbeing, that promotes the best possible learning.</p>	This element of the proposal would continue to support schools to target the funding to support vulnerable and disadvantaged learners as they feel appropriate.
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Neutral	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Neutral	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	We are not sure if this affects our school or not, but if it means fairing and more funding for our school, to support our pupils are in agreement.	Comment noted.

	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Neutral	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Strongly disagree	
	Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)	We feel that we would rather see this implemented in April 2025, following a count date in November 2024. This will reduce the amount of confusion and disruption and leaves school knowing exactly where they are in October 2024 based on predicted pupil numbers. We feel a 2-year lead in just doesn't make sense.	Comment noted.

Question Ref	Q1 (Name of School:)	Ysgol Cefnlllys	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led	Strongly agree	

	funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)		
	Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)	Schools need more funding and central services can feel too heavy at times.	Comment noted.
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Strongly agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally)?)	Neutral	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Neutral	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Neutral	
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Agree	

	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Strongly agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Agree	
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Strongly agree	
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Strongly disagree	

Question Ref	Q1 (Name of School:)	Arddleen County Primary	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Agree	
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally)?)	Agree	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Agree	

	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Neutral	
	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	The risk mentioned in para 4.5.1 is significant	Comment noted.
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Disagree	
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Agree	

	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	we are not clear how this new formula will be applied [in particular the square meterage] when the school rents a village hall -which forms part of the same building as the school-as theri assembly hall and other purposes during the school day	Funding of rented halls has a separate element within the formula and there are no proposals to amend this principle.
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Question Ref	Q1 (Name of School:)	Ysgol Gymraeg Dyffryn y Glowyr	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support	Agree	

	required in secondary phase schools in Powys?)		
	Q5 (Please provide any additional comments you have in relation to the existing “First class of 15” distribution mechanism.)	The first class of 15” formula does not take a social model approach to removing barriers for every child who need additional support or accommodations be they at primary or secondary education phase and will make receiving adequate support a post code lottery where support will depend on how long NHS waiting lists are and for example on how much teaching staff understand and account for neurodiversity.	Comment noted.
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Neutral	
	Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)	Children with ALN can have many varied and ongoing issues, each needing different adjustments and their conditions and support needs can vary dramatically throughout their schooling. This formula does not account for the difficulties many parents and schools have in accessing diagnoses to support their evidence for medical need and will restrict undiagnosed pupils from support making the system unequitable. We are concerned that not enough research has	The ALN Act focusses on a need led system rather than a diagnosis led one. There is no stipulation that a learner must have a diagnosis to gain support to meet their needs. Schools should be able to evidence the support they are putting in place to meet the individual needs of their learners and what the impact of the support is.

		been conducted to establish an accurate picture of potential need.	
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally?)	Agree	
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Agree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Agree	
	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	In theory we support number 8, but we have some concerns that the funding formula should instead be based on how many learners have ULP/IDP/LA IDP as this method does not take into account the years of battle it can take for many parents and schools to have their children's needs recognised. We already know that between 12% and 20% of all children will have some level of neurodivergence with 10% of the	The ALN Act focusses on a need led system rather than a diagnosis led one. There is no stipulation that a learner must have a diagnosis to gain support to meet their needs. Schools should be able to evidence the support they are putting in place to meet the individual needs of their learners and what the impact of the support is.

		<p>population being dyslexic alone yet many of them are not supported till adulthood and this formula will perpetuate this issue. A better formula would be to ensure basic funding to cover 20% of total student numbers were being accounted for whilst a separate budget is kept aside for children who need more 'specialist' support.</p> <p>We think the number should be renewable every time there are changes to pupil numbers to ensure we are not discriminating against any pupils who need support or making schools pay over and above for taking on ALN children at other points in the year. However we do not believe it is fair for any pupil to be denied access to more than 50% time in specialist centres if they are not ready/able to learn in mainstream settings.</p> <p>Regarding number 9: Forcing children to do this can increase behavioural problems which can then affect the learning of many more children in the mainstream setting as well as affecting the wellbeing of the ALN child.</p>	<p>This proposal does not relate to admission to specialist centres.</p>
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q14 (Please provide any additional comments you have in relation to the	We believe both primary and secondary schools should have the same formula and continuity of practice where possible.	Comment noted.

	teaching and learning top ups in the mainstream secondary phase formula.)	<p>However we do not believe it is fair for any pupil to be denied access to more than 50% time in specialist centres if they are not ready/able to learn in mainstream settings. Forcing children to do this can increase behavioural problems which can then affect the learning of many more children in the mainstream setting as well as affecting the wellbeing of the ALN child.</p> <p>We need more clarity on this issue in order to make an informed decision.</p> <p>We believe that the current formula for additional support is not equitable, but would need more clarity in order to make informed decisions.</p>	This proposal does not relate to admission to specialist centres.
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Disagree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Agree	
	Q18 (Please provide any additional comments you have in relation to the	The funding formula neglects to consider many families who do not qualify for Free School Meals who are experiencing	It is fully recognised that there are families who are not eligible for e-FSM who experience poverty and deprivation.

proposed distribution of funding to support disadvantaged learners.)

poverty and deprivation due to the cost of living crisis. Many people forced to use food banks do not qualify for FSMs and their deprivation should also be taken into account in any formula used. More work needs to be done to ensure more parents complete the forms for free school meals or at least feedback on why they cannot access free school meals. We believe all disadvantaged learners should qualify for the specific support they need, so their individual needs are met so the above formulas being capped does not make sense as that would leave some children disadvantaged. With the FSM indicator not being inclusive of families who are very much struggling this means we are missing entire groups. Difficulties with accessing diagnoses and assessments means some children need more support and adaptations but their needs are not assessed in time so they are missing out and falling behind. Earlier identification of need and/or diagnosis is essential in order to ensure children are able to access the support they need and for schools to access the funding required to support them.

We feel the current funding system will disadvantage some learners. The amount provided should not be capped with less being given once you reach over 40% and all schools should qualify with the same increased increments.

Whilst e-FSM is the proposed indicator to calculate this element of the formula, it is considered that this funding is provided to support all disadvantaged learners regardless of their socio-disadvantaged background.

Families are able to access support from the Income and Awards Team should they require assistance with the completion and submission of applications. In addition, all social media communications regarding the rollout of Universal Primary Free School Meals highlights the benefits of e-FSM application, including access to the Schools Essentials Grant for school clothing.

Support for learners with additional learning needs (ALN) will be met through the proposed ALN element of the formula.

		We do not agree that the funding should be capped at 40%.	<p>The proposed multipliers are not capped at 40%, any school that has an e-FSM percentage for 40% or above will have the multiplier of 3 applied.</p> <p>Only one mainstream school has e-FSM numbering above 40% and that is due to the exceedingly small learner numbers.</p>
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Strongly agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	We do agree that there should be a separate rate for each utility type and it needs to include funding for external utility usage (car park lighting and cameras) and not just interior utilities.	Commented noted
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

	<p>Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)</p>	<p>We believe in order to make schools fully accessible and for them to have warm spaces where the children can learn the size of the school needs to be taken into account.</p> <p>Yes, we believe the new funding formula should be phased in and not be a sudden change. As we do not have specifics on financial implications and some schools may need to adjust to the new formula it is essential they be given the time to do this.</p>	<p>The size of school is taken into account in the current and the proposed premises element of the formula.</p> <p>Comment about phased implementation noted.</p>
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Question Ref	Q1 (Name of School:)	Ysgol Llanfyllin	Response
	<p>Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)</p>	<p>No</p>	
	<p>Q3 (If no, please provide further information:)</p>	<p>Rwyf yn gadeirydd Gweithlu y Gymraeg ysgol Llanfyllin ac yn gynghorydd sir dros Penybontfawr, Llangynog, Llanwddyn, Llanfihangel, Dolanog, Llwydiarth, Llangadfan a'r Foel.</p> <p><i>Translation: I am the chair of the Welsh language workforce(?) at Ysgol Llanfyllin and a county Councillor for Penybontfawr, Llangynog, Llanwddyn, Llanfihangel, Dolanog, Llwydiarth, Llangadfan and Foel.</i></p>	<p>Comment noted.</p>

	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Neutral	
	Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)	Mae angen llif arian arall ar gyfer cynllun trochi os yw Powys o ddifri am datblygu y Gymraeg. <i>Translation: Another funding stream is needed for the immersion scheme if Powys is serious about developing the Welsh language.</i>	Comment noted.

Secondary School

Question Ref	Q1 (Name of School:)	Ysgol Maesydderwen	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not	Strongly agree	

	adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)		
	Q5 (Please provide any additional comments you have in relation to the existing “First class of 15” distribution mechanism.)	All schools are currently funded the same for ALN regardless of need. These means that schools with high ALN numbers are underfunded for need and hence there are significant numbers of learners who are not receiving the appropriate support that they require due to a lack of funding. This is not fair and equitable.	Comment noted.
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Strongly agree	
	Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)	Schools should be given the responsibility and accountability of ensuring the funding for ALN learners is provided directly to these learners.	Comment noted.
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Strongly agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers	Strongly agree	

	are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally?)		
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Strongly agree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Strongly agree	
	Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)	Currently nearly all of the learners who are registered at the Specialist Centre access mainstream school and we the school does not receive any funding for these learners. A 50% ratio would be a fairer system.	Comment noted.
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Agree	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Strongly agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Strongly agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent	Strongly agree	

	upon the proportion of the incidence of social deprivation among learners within a school's population?)		
	Q18 (Please provide any additional comments you have in relation to the proposed distribution of funding to support disadvantaged learners.)	As the number of disadvantaged learners increase the number of complex issues also significantly increases. In order to support disadvantaged learners effectively the funding needs to recognise that an increase in support is needed as the number of disadvantaged learners increases.	Comment noted.
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Strongly agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Strongly agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	
	Q24 (Please provide any additional comments you have in relation to the implementation of the proposed formula changes.)	From our perspective the sooner these changes are implemented the better but we do recognise that if we want a fairer system then we need to support schools whose funding may decrease time to prepare for these changes. However, if	Comment noted.

		modelling shows that any losses for any school are minimal or can be supported from the LA for April 24 then a sooner change would be better.	
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Question Ref	Q1 (Name of School:)	Schools forum	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	No	
Page 106	Q3 (If no, please provide further information:)	This seems the best way to record my views as Chair of the Schools Forum which have been informed by discussions at the last 2 Forum meetings. Unfortunately the draft notes of the last meeting are not available yet so my efforts to take into account their views will have to rely on my memory of what was said.	Comment noted.
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Neutral	
	Q5 (Please provide any additional comments you have in relation to the	The information presented in the bar chart in par 4.3.8 does not demonstrate 'that the existing first class of 15	The intention of the chart was to demonstrate that the existing funding

existing “First class of 15” distribution mechanism.)

distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts'. The bar chart adds together the number of students receiving free school meals and the number of children with ALN. it does not take account of the fact that some children receiving free school meals also have ALN. That means there is double counting. It also fails to take account of the fact that some children receiving free school meals do not have ALN and should not therefore be taken into account when looking for a measure of the relative level of need for ALN support.

Para 4.3.8 also says that 'it should be noted that the incidence of ALN used in the chart does not reflect the complexity of ALN needs within each school'. That means the bar chart does not capture the different levels of the three types of ALN recorded in this document. Appendix A does provide this detail.

A better way of demonstrating the need for ALN support would be a bar chart using the weighting in paragraph 4.4.7, i.e. score of 1 for ULP, 15 for School IDP and 40 for LA IDP. I'm not sure it helps using free school meals data at all.

Can revised information along the lines referred to above be provided please?

mechanism did not adequately reflect the needs of the learners, whether those were needs in relation to ALN or disadvantage.

Further analysis can be shared at the next Schools Budget Forum meeting.

		<p>In addition the Welsh Government Regulations relating to Schools Forums say explicitly that local authorities MUST set out the likely financial effect of any such changes to the funding formula. The Council has not done this despite requests from the Forum to do so. This information is key so that decision makers can see what effects the proposed changes will have on different types of school, .e.g. which types of schools will get more money and which less.</p>	
	<p>Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)</p>	<p>Neutral</p>	

	<p>Q7 (Please provide any additional comments you have in relation to the ALN retained budget and the level of delegation.)</p>	<p>Increasing the delegation of more resources to schools is to be welcomed. At present the Council has one of the lowest delegation rates for education spending of all local authorities in Wales and this change will improve the Council's position.</p> <p>The Forum wished to highlight though that whilst there has been a demonstrable increase of ALN in recent years the overall funding available has not increased. Keeping the amount the same means that notwithstanding the increased delegation it will become more and more difficult for schools to fully address ALN.</p>	<p>Comment noted.</p>
	<p>Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)</p>	<p>Neutral</p>	
	<p>Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the first Friday following the Autumn half-term, as agreed locally?)</p>	<p>Agree</p>	
	<p>Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)</p>	<p>Neutral</p>	
	<p>Q11 (Do you agree that an adjustment is made to secondary phase school learner</p>	<p>Disagree</p>	

	<p>numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)</p>		
	<p>Q12 (Please provide any additional comments you have in relation to the proposed distribution of notional ALN funding.)</p>	<p>Q8 - cannot come to a view on this until it can be demonstrated that the 'First class of 15" distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys'. See comment in response to Q5. If this is proven then distribution by weighted numbers of ALN students makes sense.</p> <p>Q9 - in agreeing to this, provision does need to be made for any large in year changes, e.g. a school gaining or losing a couple of students with LA IDPs.</p> <p>Q10 - para.4.4.7 makes it clear that these proportions have been calculated to make sure that the overall sum available does not exceed £3.706M. This does not then equate to the actual costs of making provision for students with the different categories of ALN. The Forum need to be assured that, especially with LA IDP students, the funds will be sufficient to meet identified needs.</p> <p>Q11 - The Forum is of the view that the pending review of specialist centres is completed before any changes are made to the funding formula for these centres</p>	<p>Q8: Further analysis can be shared at the next Schools Budget Forum meeting.</p> <p>Q9: The contingency budget of the Schools delegated funding would need to accommodate provision for any large in-year changes relating to ALN, which would need to be considered alongside any other large scale changes.</p> <p>Q10: The total ALN retained budget has not been fully utilised in the last 2 financial years resulting in the balance being distributed across all schools at the end of the financial year. The proposals will make sure that the funding is delegated in line with learners' needs from the start of the financial year, allowing schools to plan for the funding.</p> <p>Q11: The proposals will being secondary schools with specialist centres in line with primary schools with specialist centres and would not impact on the review of specialist centres.</p>

	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Agree	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Disagree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Neutral	
	Q18 (Please provide any additional comments you have in relation to the proposed distribution of funding to support disadvantaged learners.)	Q15 - the Council has not made a compelling case for using free school meals rather than the official Welsh Government Index of Multiple Deprivation. It is acknowledged that there are many other children experiencing deprivation for a variety of reasons who are not in receipt of free school meals. It is also the case that the roll out of free school meals is skewing the number of	As set out on p. 22 of the Consultation document, the Welsh Government Index of Multiple Deprivation (WIMD) was considered, however, it is from 2019, which is prior to the COVID pandemic and the cost-of-living crisis and therefore is not representative of the impact of these.

		<p>parents applying as increasing numbers no longer need to. Although the Welsh Government Index needs updating (next year I understand) it is a better measure of deprivation than eligibility than free school meals claimants. It is widely used by Government Departments when allocating resources to tackle deprivation.</p> <p>Q17 - The principle here makes sense but no information has been provided on the financial implications for different types of school. As stated in response to Q4 - Welsh Government Regulations relating to Schools Forums say explicitly that local authorities MUST set out the likely financial effect of any such changes to the funding formula. This information is key so that decision makers can see what effects the proposed changes will have on different types of school, .e.g. which types of schools will get more money and which less.</p>	<p>Universal Primary Free School Meal (UPFSM) data is being closely monitored at a local and national level, and there has been no nationally issued data which confirms that UPFSM data is 'skewing' e-FSM data.</p> <p>e-FSM is often used in Welsh Government grant formula.</p> <p>e-FSM eligibility can alter on a daily basis, however, knows many e-FSM learners they have on roll at any one time.</p> <p>Currently there is no e-FSM element within the secondary formula that is based on learner eligibility. The proposal seeks to continue the current level of funding in the primary phase formula and provide a similar amount in the secondary phase formula.</p>
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	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential utilities inflation experienced in recent years?)	Agree	
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q21 (Please provide any additional comments you have in relation to the proposed changes to the premises funding.)	<p>The current level of funding available to meet existing energy and maintenance costs is insufficient as evidenced by schools having to draw from their reserves to meet these costs and the huge backlog of maintenance work.</p> <p>Further top ups should be considered for schools with particular features that require extra expenditure, e.g. schools with large numbers of trees to look after. Must express an interest here as my local school has lots of trees to maintain.</p>	<p>Comments noted.</p> <p>The proposed changes to the premises element of the formula will redistribute the quantum of funding but will not lead to changes in the overall level of funding.</p>
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Question Ref	Q1 (Name of School:)	Anonymous	Response
	Q2 (Is this the official response on behalf of the School, agreed by the Chair of Governors and the Headteacher?)	Yes	
	Q4 (Do you agree that the existing “First class of 15” distribution mechanism in the secondary phase formula does not adequately reflect the variance in characteristics of the learner cohorts, and therefore the relative level of ALN support required in secondary phase schools in Powys?)	Agree	
	Q6 (Do you agree with maximising the delegation of the existing ALN retained budget, including all existing band-led funding, with the exception of a small budget to allow for learner changes in special schools and new learners with ALN?)	Agree	
	Q8 (Do you agree that notional ALN funding should be distributed to all mainstream schools based on the number of learners in each of the new categories (ULP, School IDP, LA IDP) in their learner population?)	Agree	
	Q9 (Do you agree that the school level data on ULP, School IDP and LA IDP numbers are extracted on the same day as the learner number data is extracted (i.e. the	Agree	

	first Friday following the Autumn half-term, as agreed locally?)		
	Q10 (Do you agree with the ratios of ULP equivalents set out in Table 1?)	Agree	
	Q11 (Do you agree that an adjustment is made to secondary phase school learner numbers for 50% of the learners registered at the secondary phase specialist centres, to align with how primary schools are funded for reintegration?)	Neutral	
	Q13 (Do you agree that the teaching and learning top ups in the mainstream secondary phase formula be revised?)	Neutral	
	Q15 (Do you agree that funding should be distributed to all mainstream schools on the basis of the eFSM eligibility indicator to support disadvantaged learners?)	Agree	
	Q16 (Do you agree that the relative need to spend increases as the proportion of disadvantaged learners in a school increases?)	Agree	
	Q17 (Do you agree with the multiplier factors set out in Table 5 above which will increase the funding per learner dependent upon the proportion of the incidence of social deprivation among learners within a school's population?)	Agree	
	Q19 (Do you agree that the methodology for distributing funding for premises needs to be updated to reflect the differential	Agree	

	utilities inflation experienced in recent years?)		
	Q20 (Do you agree that there should be separate rates per square metre for base premises funding and for each of the utility types?)	Agree	
	Q22 (Do you agree that there should be separate top up for schools with working kitchens?)	Agree	
	Q23 (Do you agree that the implementation of the proposed formula changes should be phased?)	Agree	

Impact Assessment

School Funding Formula Review and Amendments



Impact Assessments (IA) are a process of assessing how our proposals and decisions might impact upon different types of people and communities and developing proposals in line with relevant legislation.

This is a legal requirement, and ensures the Council considers key legislation, including Equalities, Welsh language, Future Generations, Socio-economic Duty and Risk when developing proposals.

It will also help the Council make the best possible decisions for the people of Powys.

1. Proposal Information

Author Name	Sarah Quibell / Mari Thomas
Head of Service	Georgie Bevan / Jane Thomas
Portfolio Holder	Cllr Pete Roberts, Cabinet Member for a Learning Powys / Cllr David Thomas, Cabinet Member for Finance and Corporate Transformation
Proposal title	School Budget Funding Formula Review and Amendments
Description of proposal	Following review and consultation, amendments to the school funding formulae for mainstream schools are proposed for notional ALN funding, a factor for deprivation and premises related funding.

2. Savings and Consultation

Profile of savings delivery

2023-24	2024-25	2025-26	2026-27	2027-28	2028+	Total Savings
£0	£0	£0	£0	£	£0	£0

Further information

The proposals are to redistribute the schools delegated budget in the three areas (ALN, deprivation and premises) but not alter the overall quantum.

Consultation requirements

Consultation required?	Yes
Union consultation date	N/A
Staff consultation date	N/A
Public consultation date	N/A

Consultation plan (or justification where no consultation is required)

In line with good practice, the School Funding (Wales) Regulations 2010 require authorities to consult with the governing bodies of all schools it maintains when proposing amendments to the school funding formula.

A Formula Review Group was established in 2023 with a range of stakeholders, including headteachers and chairs of governors from each school sector, along with Council officers. The group has met on two occasions, in July and September 2023 to review the existing formulae, before developing a set of proposals for Primary, Secondary and All age schools.

The consultation on the current proposals took place between 8 November 2023 and 1 December 2023 following full discussion with the School Budget Forum.

In addition, all Chairs of Governors and headteachers were invited to a meeting with the Head of Education on the 29 November 2023, in which the proposals were presented in full. The Head of Finance (Section 151 Officer) was also in attendance at the meeting.

3. Impact on other service areas, geographical areas, and data protection

1a. Impact on other service areas

None

1b. Impact on geographical locations

All Powys schools

1c. Data protection impact assessment

Will the proposal involve processing the personal details of individuals?	No
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Is Powys County Council the data controller?	No
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Further information

N/A

4. Impact on well-being goals including Welsh language and equalities

1d. A prosperous Wales

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

1e. A resilient Wales

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

1f. A healthier Wales

Impact	<p>Retaining the current secondary funding formula as it stands will continue the allocation of a “First class of 15” funding, which includes the notional ALN funding – each year group in each stream and on each site that has 16 or more learners is funded for an initial teacher-learner ratio of 1 FTE teacher to 15 learners. It does not take account of the number of learners with ALN or eligible for FSM and does not differentiate between them.</p> <p>Additional Learning Needs:</p> <p>Currently we retain the majority of the notional ALN funding and distribute via Panel applications based on individual learners, which does not mirror the method used by the majority of Welsh local authorities. The process is time consuming for schools and the service and can delay the transfer of funding and impact on a school’s ability to intervene appropriately.</p> <p>Deprivation:</p> <p>For the purposes of funding distribution, it is considered that funding is provided to support all disadvantaged learners regardless of their socio-economic background.</p> <p>This is addressed in the current mainstream primary phase formula by distributing a set amount across all mainstream primary settings based on the three-year average number of eFSM at each school.</p> <p>The current methodology through the mainstream primary phase formula provides the same amount per learner eligible for eFSM, regardless of the overall proportion of the school’s population that is eligible for eFSM.</p> <p>It is noted that currently there is no equivalent allocation for mainstream secondary settings. Instead, in the secondary phase formula, each school receives an amount to cover the cost of the free school meals provided, which could not be used to support disadvantaged learners (the funding for this was included within the 1:15 funding).</p>
Impact Rating	Poor

Mitigation

The proposed changes to the funding formulae will target resources at schools with greater need within their learner population, allowing schools to plan for sustainable support for those learners.

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

- Create a **more equitable provision for all learners** across Powys
- **Support the aspirations of the transformation programme**
- **Support all learners** including helping **offset the effects of disadvantage**
- **Support a collaborative schools' community** which offers effective professional learning to facilitate the self improving system.
- **Support inclusion and bilingualism, and promote access to excellence for all learners.**

The proposals will see the majority of the current retained notional ALN funding redistributed to schools, with a small amount retained per annum, which would only be available to provide funding to new complex presentations of ALN, whether through a learner being new to a Powys school or a learner suffering a life-changing event / illness.

By changing the methodology for distributing notional ALN funding to schools and delegating the majority of funds, there are benefits for all stakeholders and the potential to reduce the long term societal and financial costs associated with learners who may struggle without early intervention and consequent proper support.

The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based on the incidence of social deprivation among pupils registered at all such schools.” In addition to the use of the number of eFSM learners per schools, it is proposed that a multiplier is used to increase the weighting of the eFSM indicator as the proportion of the school population that is eligible for eFSM increases.

Implementation:

It is also proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:

	<ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula.
Mitigated Rating	Good

1g. A Wales of cohesive communities

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

1h. A globally responsible Wales

Impact

The current funding formula for secondary phase schools funds all schools and streams in the same way regardless of the characteristics of their learner population and does not target funding towards those that need support.

In addition, for those learners with a higher level of additional learning needs (ALN) additional band-led funding is provided following a potentially onerous application process. This makes it difficult for schools to plan support for those learners.

Retaining the current secondary funding formula as it stands will continue the allocation of a “First class of 15” funding, which includes the notional ALN funding – each year group in each stream and on each site that has 16 or more learners is funded for an initial teacher-learner ratio of 1 FTE teacher to 15 learners. It does not take account of the number of learners with ALN or eligible for FSM and does not differentiate between them.

Additional Learning Needs:

Currently we retain the majority of the notional ALN funding and distribute via Panel applications based on individual learners, which does not mirror the method used by the majority of Welsh local authorities. The process is time consuming for schools and the service and can delay the transfer of funding and impact on a school’s ability to intervene appropriately.

Deprivation:

For the purposes of funding distribution, it is considered that funding is provided to support all disadvantaged learners regardless of their socio-economic background.

This is addressed in the current mainstream primary phase formula by distributing a set amount across all mainstream primary settings based on the three-year average number of eFSM at each school.

The current methodology through the mainstream primary phase formula provides the same amount per learner eligible for eFSM, regardless of the overall proportion of the school’s population that is eligible for eFSM.

It is noted that currently there is no equivalent allocation for mainstream secondary settings. Instead, in the secondary phase formula, each school receives an amount to cover the cost of the free school meals provided, which could not be used to support disadvantaged learners (the funding for this was included within the 1:15 funding).

Mitigation

The proposed changes to the funding formulae will target resources at schools with greater need within their learner population, allowing schools to plan for sustainable support for those learners

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

- Create a **more equitable provision for all learners** across Powys
- **Support the aspirations of the transformation programme**
- **Support all learners** including helping **offset the effects of disadvantage**
- **Support a collaborative schools' community** which offers effective professional learning to facilitate the self improving system.
- **Support inclusion and bilingualism, and promote access to excellence for all learners.**

The proposals will see the majority of the current retained notional ALN funding redistributed to schools, with a small amount retained per annum, which would only be available to provide funding to new complex presentations of ALN, whether through a learner being new to a Powys school or a learner suffering a life-changing event / illness.

By changing the methodology for distributing notional ALN funding to schools and delegating the majority of funds, there are benefits for all stakeholders and the potential to reduce the long term societal and financial costs associated with learners who may struggle without early intervention and consequent proper support.

The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based on the incidence of social deprivation among pupils registered at all such schools.” In addition to the use of the number of eFSM learners per schools, it is proposed that a multiplier is used to increase the weighting of the eFSM indicator as the proportion of the school population that is eligible for eFSM increases.

Implementation:

It is also proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the

	<p>new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula.
Mitigated Rating	Good

1i. A Wales of vibrant culture and thriving Welsh language

Using Welsh

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Promoting Welsh

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Sports, Art & Recreation

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

1j. A more equal Wales

Age

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Disability

Impact	<p>The current funding formula for secondary phase schools funds all schools and streams in the same way regardless of the characteristics of their learner population and does not target funding towards those that need support.</p> <p>In addition, for those learners with a higher level of additional learning needs (ALN) additional band-led funding is provided following a potentially onerous application process. This makes it difficult for schools to plan support for those learners.</p> <p>Retaining the current secondary funding formula as it stands will continue the allocation of a “First class of 15” funding, which includes the notional ALN funding – each year group in each stream and on each site that has 16 or more learners is funded for an initial teacher-learner ratio of 1 FTE teacher to 15 learners. It does not take account of the number of learners with ALN or eligible for FSM and does not differentiate between them.</p> <p>Currently we retain the majority of the notional ALN funding and distribute via Panel applications based on individual learners, which does not mirror the method used by the majority of Welsh local authorities. The process is time consuming for schools and the service and can delay the transfer of funding and impact on a school’s ability to intervene appropriately</p>
Impact Rating	Poor

<p>Mitigation</p>	<p>The proposed changes to the funding formulae will target resources at schools with greater ALN need within their learner population, allowing schools to plan for sustainable support for those learners. This will enable schools to support learners with ALN to fulfil their potential</p> <p>The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will create a more equitable provision for all learners across Powys</p> <p>The proposals will see the majority of the current retained notional ALN funding redistributed to schools, with a small amount retained per annum, which would only be available to provide funding to new complex presentations of ALN, whether through a learner being new to a Powys school or a learner suffering a life-changing event / illness.</p> <p>Implementation:</p> <p>It is also proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula.
<p>Mitigated Rating</p>	<p>Good</p>

Gender Reassignment

<p>Impact</p>	<p>Neutral</p>
<p>Impact Rating</p>	<p>Neutral</p>
<p>Mitigation</p>	<p>Neutral</p>
<p>Mitigated Rating</p>	<p>Neutral</p>

Marriage or Civil Partnership

<p>Impact</p>	<p>Neutral</p>
<p>Impact Rating</p>	<p>Neutral</p>

Mitigation	Neutral
Mitigated Rating	Neutral

Race

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Religion or belief

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Sex

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Sexual Orientation

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral

Mitigated Rating	Neutral
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Pregnancy and Maternity

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Socio-economic Duty

Impact	<p>The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based on the incidence of social deprivation among pupils registered at all such schools”.</p> <p>This is addressed in the current mainstream primary phase formula by distributing a set amount across all mainstream primary settings based on the three-year average number of eFSM at each school.</p> <p>The current methodology through the mainstream primary phase formula provides the same amount per learner eligible for eFSM, regardless of the overall proportion of the school’s population that is eligible for eFSM.</p> <p>It is noted that currently there is no equivalent allocation for mainstream secondary settings. Instead, in the secondary phase formula, each school receives an amount to cover the cost of the free school meals provided, which could not be used to support disadvantaged learners (the funding for this was included within the 1:15 funding).</p>
Impact Rating	Poor

<p>Mitigation</p>	<p>The proposed changes to the funding formulae will target resources at schools with greater need within their learner population, including factors for disadvantage, allowing schools to plan for sustainable support for those learners. This will enable schools to support learners those with disadvantage to fulfil their potential</p> <p>The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based on the incidence of social deprivation among pupils registered at all such schools.”</p> <p>The “Review of School Spending in Wales” in 2020 noted that ‘[t]here is a strong empirical evidence base showing that higher school spending has a larger, positive effect on learners from deprived backgrounds and can play a major role in reducing the attainment gap. As a result, the Review stated that ‘local authorities should therefore prioritise extra funding for deprivation’</p> <p>Therefore, it is proposed that in addition to the use of the number of eFSM eligible learners per school, a multiplier is used to increase the weighting of the eFSM indicator as the proportion of the school population.</p> <p>Implementation:</p> <p>It is also proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula
<p>Mitigated Rating</p>	<p>Good</p>

1k. Evidence

School Budget Forum meeting minutes.

Formula Review Group meeting minutes.

The proposal and consultation documents for School Budget Forum.

School Delegated Budget Funding Formula Review Cabinet Report.

5. Impact on key guiding principles & workforce

11. Sustainable development principles

Long-term

Impact	<p>Continuing with the funding formula will retain the status quo.</p> <p>Additional Learning Needs:</p> <p>Currently we retain the majority of the notional ALN funding and distribute via Panel applications based on individual learners, which does not mirror the method used by the majority of Welsh local authorities. The process is time consuming for schools and the service and can delay the transfer of funding and impact on a school's ability to intervene appropriately.</p> <p>In addition, for those learners with a higher level of additional learning needs (ALN) additional band-led funding is provided following a potentially onerous application process. This makes it difficult for schools to plan support for those learners.</p> <p>Deprivation:</p> <p>The current methodology through the mainstream primary phase formula provides the same amount per learner eligible for eFSM, regardless of the overall proportion of the school's population that is eligible for eFSM.</p> <p>It is noted that currently there is no equivalent allocation for mainstream secondary settings. Instead, in the secondary phase formula, each school receives an amount to cover the cost of the free school meals provided, which could not be used to support disadvantaged learners (the funding for this was included within the 1:15 funding).</p> <p>Premises (Primary and Secondary Phase Schools):</p> <p>The current formula methodology for premises funding is based on a standard rate per square metre (SQM) for all mainstream and special schools. The current formula does not take account of whether the school hosts a school kitchen.</p> <p>Energy costs have experienced significant inflationary increases, but these have not been uniform, either in terms of scale or timing, across the different fuel types currently used by schools for heating fuel. This has resulted in the standard amount per square metre not reflecting the differences in schools' relative need to spend, depending on their main fuel type used for heating</p>
Impact Rating	Poor

Mitigation

The proposed changes to the funding formulae will target resources at schools with greater need within their learner population, allowing schools to plan for sustainable support for those learners, whilst also appropriately targeting premises funding.

The aim of the proposed changes are to support transparent and equitable funding arrangements for Primary, Secondary and All age schools, which will:

- Create a **more equitable provision for all learners** across Powys
- **Support the aspirations of the transformation programme**
- **Support all learners** including helping **offset the effects of disadvantage**
- **Support a collaborative schools' community** which offers effective professional learning to facilitate the self improving system.
- **Support inclusion and bilingualism, and promote access to excellence for all learners.**

Additional Learning Needs:

The proposals will see the majority of the current retained notional ALN funding redistributed to schools, with a small amount retained per annum, which would only be available to provide funding to new complex presentations of ALN, whether through a learner being new to a Powys school or a learner suffering a life-changing event / illness.

By changing the methodology for distributing notional ALN funding to schools and delegating the majority of funds, there are benefits for all stakeholders and the potential to reduce the long term societal and financial costs associated with learners who may struggle without early intervention and consequent proper support.

Deprivation:

The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based on the incidence of social deprivation among pupils registered at all such schools.” In addition to the use of the number of eFSM learners per schools, it is proposed that a multiplier is used to increase the weighting of the eFSM indicator as the proportion of the school population that is eligible for eFSM increases.

Premises (Primary and Secondary Phase Schools):

	<p>It is proposed that the funding rate per square metre for grounds and premises is revised to exclude utility costs and any additional costs associated with hosting a working kitchen.</p> <p>There would be</p> <ul style="list-style-type: none"> • A new standard premises funding that applies to all schools - sqm of school x base rate per sqm (excluding utilities). • A utility specific rate per square metre is used to provide funding for schools based on the main fuel used for heating - Sqm of school x utility specific rate per sqm. • A utility top-up is applied to schools with working kitchens based on a rate per SQM of the kitchen areas - sqm of kitchen area x applicable top up rate per sqm. <p>Implementation:</p> <p>It is also proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula
Mitigated Rating	Good

Collaboration

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

Involvement (including Communication & Engagement)

Impact	Neutral
Impact Rating	Neutral

Mitigation	Neutral
Mitigated Rating	Neutral

Prevention

Impact	<p>Continuing with the funding formula will retain the status quo.</p> <p>Additional Learning Needs:</p> <p>Currently we retain the majority of the notional ALN funding and distribute via Panel applications based on individual learners, which does not mirror the method used by the majority of Welsh local authorities. The process is time consuming for schools and the service and can delay the transfer of funding and impact on a school's ability to intervene appropriately.</p> <p>In addition, for those learners with a higher level of additional learning needs (ALN) additional band-led funding is provided following a potentially onerous application process. This makes it difficult for schools to plan support for those learners.</p> <p>Deprivation:</p> <p>The current methodology through the mainstream primary phase formula provides the same amount per learner eligible for eFSM, regardless of the overall proportion of the school's population that is eligible for eFSM.</p> <p>It is noted that currently there is no equivalent allocation for mainstream secondary settings. Instead, in the secondary phase formula, each school receives an amount to cover the cost of the free school meals provided, which could not be used to support disadvantaged learners (the funding for this was included within the 1:15 funding).</p> <p>Premises (Primary and Secondary Phase Schools):</p> <p>The current formula methodology for premises funding is based on a standard rate per square metre (SQM) for all mainstream and special schools. The current formula does not take account of whether the school hosts a school kitchen.</p> <p>Energy costs have experienced significant inflationary increases, but these have not been uniform, either in terms of scale or timing, across the different fuel types currently used by schools for heating fuel. This has resulted in the standard amount per square metre not reflecting the differences in schools' relative need to spend, depending on their main fuel type used for heating.</p>
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Mitigation

The proposed changes to the funding formulae will target resources at schools with greater need within their learner population, allowing schools to plan for sustainable support for those learners, whilst also appropriately targeting premises funding.

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- **Support inclusion and bilingualism, and promote access to excellence for all learners.**

Additional Learning Needs:

The proposals will see the majority of the current retained notional ALN funding redistributed to schools, with a small amount retained per annum, which would only be available to provide funding to new complex presentations of ALN, whether through a learner being new to a Powys school or a learner suffering a life-changing event / illness.

By changing the methodology for distributing notional ALN funding to schools and delegating the majority of funds, there are benefits for all stakeholders and the potential to reduce the long term societal and financial costs associated with learners who may struggle without early intervention and consequent proper support.

Deprivation:

The School Funding (Wales) Regulations 2010 stipulate that “A local authority must, in determining budget shares for both primary and secondary schools which they maintain, take into account in their formula a factor or factors based on the incidence of social deprivation among pupils registered at all such schools.” In addition to the use of the number of eFSM learners per schools, it is proposed that a multiplier is used to increase the weighting of the eFSM indicator as the proportion of the school population that is eligible for eFSM increases.

Premises (Primary and Secondary Phase Schools):

	<p>It is proposed that the funding rate per square metre for grounds and premises is revised to exclude utility costs and any additional costs associated with hosting a working kitchen.</p> <p>There would be</p> <ul style="list-style-type: none"> • A new standard premises funding that applies to all schools - sqm of school x base rate per sqm (excluding utilities). • A utility specific rate per square metre is used to provide funding for schools based on the main fuel used for heating - Sqm of school x utility specific rate per sqm. • A utility top-up is applied to schools with working kitchens based on a rate per SQM of the kitchen areas - sqm of kitchen area x applicable top up rate per sqm. <p>Implementation:</p> <p>It is also proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula
Mitigated Rating	Good

Integration

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

1m. Impact on the workforce

Impact	The current funding formula can result in the recruitment of short-term contracts, which can lead to instability in the workforce and, therefore, impact learner provision.
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Impact Rating	Poor
Mitigation	<p>The proposals would result in more funding being directly delegated to schools, which may result in a more sustainable and stable workforce, and therefore continuity and improvements in learner provision.</p> <p>It is proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula
Mitigated Rating	Good

1n. Impact on payroll

Impact	There may be some impact on payroll in relation to changes in staffing in schools and the service but this is not anticipated to be significant.
Impact Rating	Neutral
Mitigation	<p>It is proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula
Mitigated Rating	Good

1o. Welsh language impact on Staff

Impact	The current funding formula can result in the recruitment of short-term contracts, which can lead to instability in the Welsh speaking workforce and, therefore, impact Welsh Medium learner provision.
Impact Rating	Poor

Mitigation	<p>The proposals would result in more funding being directly delegated to schools, which may result in a more sustainable and stable Welsh Medium workforce, and therefore continuity and improvements in Welsh Medium learner provision.</p> <p>It is proposed that the implementation is staggered over 2 years to support schools during the change, mitigate any risk and minimise disruption. This will also give the opportunity to review the impact of the new distribution methodology during the first year. It is proposed that the phasing is:</p> <ul style="list-style-type: none"> • Year 1 = 50% new formula, 50% current formula • Year 2 = 100% new formula
Mitigated Rating	Good

1p. Impact on apprenticeships

Impact	Neutral
Impact Rating	Neutral
Mitigation	Neutral
Mitigated Rating	Neutral

1q. Evidence

School Budget Forum meeting minutes.

Formula Review Group meeting minutes.

The proposal and consultation documents for School Budget Forum.

School Delegated Budget Funding Formula Review Cabinet Report.

6. Likelihood and risks

Risk 1

Schools who are subject to a significant reduction in funding due to the changes may struggle to balance their budget.

Likelihood score	3	Impact score	3	Risk rating	9
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Mitigation

The proposals are in response to feedback from schools, who identified the need for ALN and deprivation funding to follow the learner. There will be schools, and therefore learners, who will significantly benefit from the changes. A reduction in administration for ALN processes should also positively impact schools.

Schools who have cooking kitchens that export meals to other schools also raised that they were not reimbursed for their utilities expenditure.

The proposed amendments seek to address the issues.

The proposals underwent full consultation, ensuring that all schools and governing bodies had the opportunity to review and feedback on the proposals.

It is proposed that the changes are phased in over 2 years, allowing schools greater time to plan for and implement the required changes..

Residual likelihood score	3	Residual impact score	2	Residual risk rating	6
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Risk 2

Inaccurate data results in schools receiving the incorrect amount of funding.

Likelihood score	3	Impact score	3	Risk rating	9
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Mitigation

The Service will continue to provide schools with clear information about correct data recording, as well as continue to offer scheduled and bespoke training opportunities and drop-in sessions in respect data entry and recording.

It is proposed that the changes are phased in over 2 years, allowing schools greater time to plan for and implement the required changes.

Data will also be centrally reviewed, with anomalies being highlighted to schools so that they can be rectified.

Residual likelihood score	2	Residual impact score	1	Residual risk rating	2
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Risk 3

Click or tap here to enter text.

Likelihood score	Choose an item.	Impact score	Choose an item.	Risk rating	Choose an item.
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Mitigation

Click or tap here to enter text.

Residual likelihood score	Choose an item.	Residual impact score	Choose an item.	Residual risk rating	Choose an item.
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Risk 4

Click or tap here to enter text.

Likelihood score	Choose an item.	Impact score	Choose an item.	Risk rating	Choose an item.
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Mitigation

Click or tap here to enter text.

Residual likelihood score	Choose an item.	Residual impact score	Choose an item.	Residual risk rating	Choose an item.
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Risk 5

Click or tap here to enter text.

Likelihood score	Choose an item.	Impact score	Choose an item.	Risk rating	Choose an item.
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Mitigation

Click or tap here to enter text.

Residual likelihood score

Choose an item.

Residual impact score

Choose an item.

Residual risk rating

Choose an item.

7. Overall summary and judgement

Outline assessment

The proposed formula and scheme changes will lead to a stable, transparent and fair funding arrangement for Powys learners and schools. The proposed formula changes will create more equitable funding provision for all primary and secondary mainstream schools across Powys, supporting inclusion and all learners regardless of their additional learning needs or disadvantage. Risks to schools with a reduced level of funding will be mitigated by phasing in of the proposals, providing support for schools to reduce their costs and access to the wider “Team around the School” to support them with the transition.

Cabinet reference

Click or tap here to enter text.

8. Additional evidence

School Budget Forum meeting minutes.

Formula Review Group meeting minutes.

The proposal and consultation documents for School Budget Forum.

School Delegated Budget Funding Formula Review Cabinet Report.

9. Monitoring arrangements

The school funding formula is reviewed each year to ensure that it distributes the schools delegated budget equitably across all schools. This will include ongoing monitoring of the impact of these proposed changes if agreed and implemented.

Review date

01/03/2025

7

Learning and Skills Scrutiny Committee Forward Work Programme 2024

2024

Date and Time	Type and Detail	
Jan 15 th 2pm	Informal committee session - Schools Funding Formula Review	Mari Thomas / Nancy Owen
Jan 17 th 2pm	Committee – Public CANCELLED	
Jan 30 th 10am	Committee - Public Budget Scrutiny	
Feb	Pre-Meeting (if required)	
Feb 9 th 2pm (2)	Committee – Public Alternative Budget (if required) The Offer –Yr 7 - Yr13 JICPA - Update	Georgie Bevan Lynette Lovell / Georgie Bevan
Feb 26 th	Joint Scrutiny – Pre meet	James Langridge Thomas / Catherine James
Feb 28 th	Joint Scrutiny - Performance	James Langridge Thomas / Catherine James
Mar 14 th 2pm	Self-Assessment Private session	Committee Members Only
Mar 18 th 2pm	Pre-Meeting	
Mar 20 th 2pm (3)	Committee - Public To be discussed:- School visits To be discussed:- Deep dives Progression and Learning (Incl. LA level verified exam data) (max 1hr) School Transformation updates Post 16 (Confidential)	Cressy Murphy / Eurig Towns Marianne Evans Chris James
May 20 th 2pm	Pre-Meeting	
May 22 nd 2pm (4)	Committee – Public Q4 Risk Finance	All Heads of Service
June 17 th 2pm	Pre-Meeting	
June 19 th	Committee – Public	
July 12 th 10am	Pre-Meeting	
July 15 th 2pm	Committee - Public	

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