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(Tel: 01443 864267 Email: [houghtk@caerphilly.gov.uk](mailto:houghtk@caerphilly.gov.uk))

**Date: 19th September 2018**

Dear Sir/Madam,

A meeting of the **Education for Life Scrutiny Committee** will be held in the **Sirhowy Room, Penallta House, Tredomen, Ystrad Mynach** on **Tuesday, 25th September, 2018** at **5.30 pm** to consider the matters contained in the following agenda. Councillors and the public wishing to speak on any item can do so by making a request to the Chair. You are also welcome to use Welsh at the meeting, both these requests require a minimum notice period of 3 working days, and a simultaneous translation will be provided if requested.

All Committee meetings are open to the Press and Public, observers and participants are asked to conduct themselves with respect and consideration for others. Please note that failure to do so will result in you being asked to leave the meetings and you may be escorted from the premises.

Yours faithfully,

A handwritten signature in black ink, appearing to read 'Chrissy', enclosed in a large, loopy oval shape.

**Christina Harrhy**  
INTERIM CHIEF EXECUTIVE

## AGENDA

Pages

- 1 To receive apologies for absence.
- 2 Declarations of Interest.

Councillors and Officers are reminded of their personal responsibility to declare any personal and/or prejudicial interest(s) in respect of any item of business on this agenda in accordance with the Local Government Act 2000, the Council's Constitution and the Code of Conduct for both Councillors and Officers.

**A greener place Man gwyrddach**



To approve and sign the following minutes:-

- |   |  |        |
|---|--|--------|
| 3 | Education for Life Scrutiny Committee held on 3rd July 2018                                      | 1 - 6  |
| 4 | Consideration of any matter referred to this Committee in accordance with the call-in procedure. |        |
| 5 | To receive a verbal report by the Cabinet Member(s).   |        |
| 6 | Education for Life Scrutiny Committee Forward Work Programme.                                    | 7 - 22 |

*\*If a member of the Scrutiny Committee wishes for any of the above Cabinet reports to be brought forward for review at the meeting please contact Kim Houghton, 01443 864267, by 10.00 a.m. on Monday, 24th September 2018.*

1. Federation of Schools – Cabinet, 11th July 2018;
2. 21st Century Schools and Education Band A Programme - Update and Proposed Allocation of Under Spend - Cabinet, 11th July 2018.

To receive and consider the following Scrutiny reports: -

- |   |   |         |
|---|---|---------|
| 7 | Pupil Attainment at Foundation Phase, Key Stage 2 and Key Stage 3 - 2017. | 23 - 34 |
| 8 | Budget Monitoring 2018/19   | 35 - 44 |

#### **Circulation:**

**Councillors** C. Andrews (Vice Chair), P.J. Bevan, A. Collis, S. Cook, W. David, A. Farina-Childs, D.T. Hardacre, D. Havard (Chair), M.P. James, B. Miles, Mrs G.D. Oliver, Mrs T. Parry, J.E. Roberts, R. Saralis, J. Simmonds and R. Whiting

#### **Co-opted Members:**

**Cardiff ROC Archdiocesan Commission for Education Representative** (with voting rights on educational matters)  
Mr M. Western

**Parent Governor Representatives** (with voting rights on educational matters) Mr M Barry and Mr R Morgan

**Outside Body Representatives** (without voting rights)  
Mrs J. Havard (NUT) and Mrs P. Ireland (NUT)

**Caerphilly Governors Association** (without voting rights)  
Mr D Davies

And Appropriate Officers

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## EDUCATION FOR LIFE SCRUTINY COMMITTEE

MINUTES OF THE MEETING HELD AT PENALLTA HOUSE, YSTRAD MYNACH  
ON TUESDAY, 3RD JULY 2018 AT 5.30PM.

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PRESENT:

Councillor D. Havard - Chair  
Councillor C. Andrews - Vice-Chair

Councillors:

A. Collis, S. Cook, A. Farina-Childs, B. Miles, T. Parry, J.E. Roberts, R. Saralis, J. Simmonds and R. Whiting

Together with:

R. Edmunds (Director of Education and Corporate Services), (K. Cole (Chief Education Officer), S. Richards (Head of Education Planning and Strategy), S. Mutch (Early Years Manager), E. Sullivan (Senior Committee Services Officer) and K. Houghton (Committee Services Officer).

Also Present:

Co-opted Members: M. Barry (Parent Governors), R. Morgan (Parent Governors), J. Havard and M. Western (Cardiff ROC Archdiocesan Commission for Education Representative)

E. Pryce (EAS), J. Wood (EAS), M. Jones (The Parent Network), Tracey Wallbank (PETRA) and Ffion Wallbank (PETRA)

### 1. APOLOGIES FOR ABSENCE

Apologies for absence were received from Councillors P. Marsden (Cabinet Member for Education and Achievement), P.J. Bevan, W. David, D.T. Hardacre, M.P. James and G.D. Oliver. Also, P.J. Ireland (NUT) and D. Davies (Caerphilly Governors Association),

### 2. DECLARATIONS OF INTEREST

There were no declarations of interest received at the commencement or during the course of the meeting.

### 3. MINUTES – EDUCATION FOR LIFE SCRUTINY COMMITTEE

Councillor T. Parry requested a correction to the minutes. She is noted as an apology in the minutes however she was present for the meeting.

Subject to the aforementioned correction it was moved and seconded that the minutes of the 22nd May 2018 be approved as a correct record and by show of hands this was unanimously agreed.

RESOLVED that subject to the aforementioned correction the minutes of the Education for Life Scrutiny Committee meeting held on Tuesday the 22nd May 2018 (minute nos. 1-13) be approved as a correct record and signed by the Chair.

**4. CONSIDERATION OF ANY MATTER REFERRED TO THE SCRUTINY COMMITTEE IN ACCORDANCE WITH THE CALL-IN PROCEDURE**

There were no matters referred to the Scrutiny Committee in accordance with the call-in procedure.

**5. REPORT OF THE CABINET MEMBER**

It was noted that an apology for absence had been received from Councillor P. Marsden, Cabinet Member for Education and Achievement; as such the report previously circulated was noted without comment. Members were asked to provide any feedback directly to Councillor Marsden via e-mail.

**6. EDUCATION FOR LIFE SCRUTINY COMMITTEE FORWARD WORK PROGRAMME**

The Senior Committee Services Officer presented the report which outlined the draft Education for Life Scrutiny Committee Forward Work Programme from July 2018 to April 2019.

Members were asked to consider the work programme and make any amendments or propose any additional items to be included for future meetings.

Following consideration, it was moved and seconded that the recommendation in the report be approved. By a show of hands this was unanimously agreed.

RESOLVED that the work programme appended to the report be approved.

**REPORTS OF OFFICERS**

Consideration was given to the following reports.

**7. SUMMARY OF ESTYN INSPECTION UNDER THE NEW COMMON INSPECTION FRAMEWORK (CIF) – SEPT 2017 TO MAY 2018**

K. Cole, E. Pryce and J. Wood introduced the report which presented the judgements made by Estyn inspection teams of Caerphilly schools for the academic year 2017-2018 (where published) under the new common inspection framework introduced in September 2017.

Members were advised that, to date, only 8 schools have had published inspection reports issued with another 4 expected in due course. As a result the sample size for the data shown in the report is based only on those initial 8 schools.

Mr Pryce drew particular attention to 4.12 of the report which showed the results of the Caerphilly Borough schools inspected under the new framework in comparison with the school's national categorisation at the time of inspection. Llanfabon Infants School was highlighted as the only significant disparity between the National Categorisation and the Estyn judgement.

K. Cole acknowledged the hard work undertaken by those schools that had moved out of the 'Significant Improvement' category. It was felt that the recent Estyn inspection results reflected a promising picture for primary schools in Caerphilly Borough. The picture for secondary schools was less positive and further support in this area would be needed. Reference was made to Lewis School Pengam and Members were advised that the Authority is working closely with the school through the Improvement Board and its Estyn Improvement Plan.

The Chair thanked K. Cole, E. Pryce and J. Wood for their presentation and Members questions were welcomed.

Members queried the timescales and process for informing the Committee of adverse Estyn judgements. Estyn judgements are published up to 44 days after the inspection and are highly confidential until the point they are in the public domain. This makes it a complicated process in terms of informing interested parties when an adverse inspection report is expected prior to publication. If information is leaked prior to publication then the inspection becomes invalid and would need to be undertaken again. The current procedure is to meet with the school's Senior Management Team, Ward Members and Cabinet Member the day before publication to prepare a public statement and formulate a plan to manage public reaction. This procedure is only carried out if an Estyn judgement has placed a school in either the 'Significant Improvement' or 'Special Measures' categories.

Members sought an update on progress made by Bedwas High School and what issues remain. The Chief Education Officer confirmed that the Local Authority worked closely with the Headteacher in the first instance to send a letter of reassurance to all parents on the day the inspection report was released. The school continues to be supported and receives a monitoring visit from Estyn once a term followed by a letter identifying progress made. Results so far have been positive with some areas still to improve. A new Headteacher has been appointed and will be in post for the beginning of the 2018 Autumn term.

Concerns were raised as to the quality and impacts of using supply staff in schools. Members were advised that the Headteacher of a school is responsible for managing the provision of supply staff. If the school is well managed then the impact on students would be minimal. Schools tend to have a pool of trusted supply teachers that they pull from when needed. It was noted that Estyn inspections do not make allowances for supply teachers and they would be judged on the same standards as if they were a permanent member of staff, thus contributing to the school's whole performance in the event of an inspection. Mrs Cole confirmed that schools often work together to support staff shortages through staff secondments and schools using grant funding to employ a 'floating' teacher who has knowledge of the school and pupils who can step into classes when substitution is needed. Schools are also being encouraged to include supply staff in training and development opportunities within the school.

Clarification was sought as to why there could be such a level of disparity between the EAS expected outcomes and Estyn Inspection outcomes as recently experienced at Llanfabon Infants School. The difference between a schools target setting methodology and the Estyn Inspection framework were explained and it was acknowledged that these would usually run along similar lines. In this instance the outcome had not been anticipated and this would need to be addressed from a lessons learned perspective. Members were assured that the EAS were working closely with the school in light of the inspection outcomes and this would include more robust target setting in order to move forward in a positive way, placing greater emphasis on the views of teachers, parents and pupils.

Following consideration and discussion, it was moved and seconded that the recommendation in the report be approved. By a show of hands this was unanimously agreed

RESOLVED that the contents of the report be noted.

## 8. WELLBEING OBJECTIVE 2017-18

S. Mutch reported on the full year implementation of the Wellbeing Objective 2017-18 which sought Members' agreement as to whether the judgement of 'partially successful' has been achieved. The Officer confirmed that significant progress had been made in completing the five aims identified within the objective. Four out of five aims have been completed however Wellbeing Objective aim 2 has not been fully achieved. This aim is 'to improve outcomes for all learners, particularly those vulnerable to underachievement'. Significant progress has been made in this area but improvement is still required particularly in the area of education indicators at Key Stage 4, despite improvements in the Local Authority's ranked position against other local authorities. For these reasons a judgement of partial success has been made.

S. Mutch went on to focus the presentation on the success of the Parents Engaging To Raise Aspirations (PETRA) project. Jointly funded through Communities First, Families First and Flying Start the Parent Network have been commissioned to undertake this project. The Parent Network has now established PETRA as a social enterprise funded by a multitude of partners including local authority areas. The project works with small groups of parents and partners them with authors and illustrators to produce children's books tackling a number of issues such as friendship, mental health, climate change, dementia and transgender. Each group receives training prior to developing their book in order to develop their understanding of the structure of a story and story telling. This has resulted in developing aspirations, skills and confidence in the parents which has in turn been passed on to the children, bringing books into the home, as well as communities, schools and libraries. The project has also engaged with final year student Illustrators at the University of Cardiff to produce artwork for the books and provide the students with an opportunity to develop their portfolio of work.

The books have been received well and are supported by the Welsh Book Council with a commission to sympathetically translate four books into Welsh. In addition, PETRA is working with Gelligaer Community Council to produce a book. This is the first time the project has been approached by a Community Council to work on a book and will also be the first to be written in Welsh first.

A case study highlighting PETRA's success for one family was presented with F. Wallbank the daughter of one of the projects parents providing the committee with a reading from a book in both English and Welsh.

The Chair thanked S. Mutch, M. Jones, T. Wallbank and F. Wallbank for their presentation and Members questions were welcomed.

A Member raised concerns regarding the engagement with final year student illustrators at the University of Cardiff, in what is a critical year in their studies and the use of professional illustrators in some cases. The Officer confirmed that professional illustrators and storytellers have been engaged to run workshops and develop the skills of the projects participants and this has been very successful. PETRA is currently liaising with Crosskeys College, looking at opportunities to involve local student illustrators in producing the books.

A Member enquired as to the promotion of this project and the books and was advised that this has been deliberately kept 'low-key' in order to allow the project to grow organically and not expand too quickly.

An Officer highlighted that there is a quarterly meeting of the Community Councils within the Borough and that a presentation from PETRA in this forum could be valuable. The next meeting will take place on 11 November 2018.

Following consideration and discussion, it was moved and seconded that the recommendation in the report be approved. By a show of hands this was unanimously agreed



RESOLVED that the contents of the report be noted and the judgement of partially successful at the full year stage in respect of the Well-being Objective assessment be agreed.

The meeting closed at 18:52pm

Approved as a correct record and subject to any amendments or corrections agreed and recorded in the minutes of the meeting held on 25th September 2018 they were signed by the Chair.

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CHAIR

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## **EDUCATION FOR LIFE SCRUTINY COMMITTEE - 25TH SEPTEMBER 2018**

**SUBJECT: EDUCATION FOR LIFE SCRUTINY COMMITTEE FORWARD WORK PROGRAMME**

**REPORT BY: CORPORATE DIRECTOR FOR EDUCATION AND CORPORATE SERVICES**

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### **1. PURPOSE OF REPORT**

1.1 To report the Education for Life Scrutiny Committee Forward Work Programme.

### **2. SUMMARY**

2.1 Forward Work Programmes are essential to ensure that Scrutiny Committee agendas reflect the strategic issues facing the Council and other priorities raised by Members, the public or stakeholders.

### **3. LINKS TO STRATEGY**

3.1 The operation of scrutiny is required by the Local Government Act 2000 and subsequent Assembly legislation. The Forward Work Programmes contribute to the following Well-being Goals within the Well-being of Future Generations Act (Wales) 2016 by ensuring there is an effective scrutiny function and that council policies are scrutinised against the following goals:

- A prosperous Wales
- A resilient Wales
- A healthier Wales
- A more equal Wales
- A Wales of cohesive communities
- A Wales of vibrant culture and thriving Welsh language
- A globally responsible Wales

### **4. THE REPORT**

4.1 The Education for Life Scrutiny Committee forward work programme includes all reports that were identified at the scrutiny committee meeting on 3<sup>rd</sup> July 2018. The work programme outlines the reports planned for the period September 2018 to April 2019.

4.2 The forward work programme is made up of reports identified by officers and members and has been prioritised into three priority areas, priority 1, 2 or 3. Members are asked to consider the work programme alongside the cabinet work programme and suggest any changes before it is published on the council website. Scrutiny committee will review this work programme at every meeting going forward alongside any changes to the cabinet work programme or report requests.

4.3 The Education for Life Scrutiny Committee Forward Work Programme is attached at Appendix 1. The Cabinet Forward Work Programme is attached at Appendix 2.

## **5. WELL-BEING OF FUTURE GENERATIONS**

5.1 This report contributes to the well-being goals as set out in links to strategy above. It is consistent with the five ways of working as defined within the sustainable development principle in that by ensuring the scrutiny function is effective when reviewing services and policies and ensure it considers the wellbeing goals.

## **6. EQUALITIES IMPLICATIONS**

6.1 There are no specific equalities implications arising as a result of this report.

## **7. FINANCIAL IMPLICATIONS**

7.1 There are no specific financial implications arising as a result of this report.

## **8. PERSONNEL IMPLICATIONS**

8.1 There are no specific personnel implications arising as a result of this report.

## **9. CONSULTATIONS**

9.1 There are no consultation responses that have not been included in this report.

## **10. RECOMMENDATIONS**

10.1 That Members consider any changes and agree the final forward work programme prior to publication.

## **11. REASONS FOR THE RECOMMENDATIONS**

11.1 To improve the operation of scrutiny.

## **12. STATUTORY POWER**

12.1 The Local Government Act 2000.

Author: Kim Houghton, Committee Services Officer  
Consultees: Richard Edmunds, Corporate Director for Education and Corporate Services  
Keri Cole, Chief Education Officer  
Rob Tranter, Head of Legal Services and Monitoring Officer  
Catherine Forbes-Thompson Interim Head of Democratic Services

Appendices:  
Appendix 1 Education for Life Scrutiny Committee Forward Work Programme.  
Appendix 2 Cabinet Work Programme.

<b>Education for Life Scrutiny Committee Forward Work Programme – May 2018 – April 2019</b>			
<b>Meeting Date: 25th September 2018</b>			
<b>Subject</b>	<b>Purpose</b>	<b>Key Issues</b>	<b>Witnesses</b>
Performance in Foundation Phase – Key Stage 3			Caerphilly Learners Partnership Representative

<b>Education for Life Scrutiny Committee Forward Work Programme – May 2018 – April 2019</b>			
<b>Meeting Date: 6th November 2018</b>			
<b>Subject</b>	<b>Purpose</b>	<b>Key Issues</b>	<b>Witnesses</b>
21 <sup>st</sup> Century Schools Programme			
Pontllanfraith Primary SRB			
Federation of Schools			Headteacher from affected School.

<b>Education for Life Scrutiny Committee Forward Work Programme – May 2018 – April 2019</b>			
<b>Meeting Date: 8th January 2019</b>			
<b>Subject</b>	<b>Purpose</b>	<b>Key Issues</b>	<b>Witnesses</b>
Youth Forum Priorities			Youth Forum Representatives
Performance Key Stage 4 and 5			
Flexibility Funding			Sarah Mutch

<b>Education for Life Scrutiny Committee Forward Work Programme – May 2018 – April 2019</b>			
<b>Meeting Date: 19th February 2019</b>			
<b>Subject</b>	<b>Purpose</b>	<b>Key Issues</b>	<b>Witnesses</b>
EAS Business Plan			EAS
WESP			
Capital Programme			



<b>Education for Life Scrutiny Committee Forward Work Programme – May 2018 – April 2019</b>			
<b>Meeting Date: 2nd April 2019</b>			
<b>Subject</b>	<b>Purpose</b>	<b>Key Issues</b>	<b>Witnesses</b>
Performance Management			
Wellbeing Objectives			
Progress Towards Targets - EAS			EAS

<b>Meeting Date: to be confirmed</b>			
<b>Subject</b>	<b>Purpose</b>	<b>Key Issues</b>	<b>Witnesses</b>
Review of Provision for Most Vulnerable Learners	To consult with Members on the outcome of the recent review and the options.	<ul style="list-style-type: none"> <li>• Quality provision</li> <li>• Value for money</li> <li>• Exclusions</li> <li>• Outcomes</li> </ul>	Head Teacher  Keri Cole – Chief Education Officer
Youth Review		<ul style="list-style-type: none"> <li>•</li> </ul>	
Additional Support Delegation		<ul style="list-style-type: none"> <li>•</li> </ul>	
SRB Funding		<ul style="list-style-type: none"> <li>•</li> </ul>	
Safeguarding – Member Request		<ul style="list-style-type: none"> <li>•</li> </ul>	

Attendance and Exclusions		•	
Performance Measures 2019 onwards		•	
Notice of Motion – Sanitary Products- Period Poverty		•	
Regional Groups – Request by Chair		•	

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## Cabinet Forward Work Programme (Scrutiny)

19TH SEPTEMBER 2018	Key Issues	Service Area
Hackney Carriage Fare Increase/Amendment.	To advise Cabinet of the Consultation Response.	Public Protection
To Adopt The WG High Street Rate Relief Scheme 2018/19 – Grant Funding.	This report recommends that Cabinet adopts the WG High Street Rate Relief Scheme for 2018/19 in order to obtain the WG grant funding which will reduce the amount of business rates payable by those ratepayers eligible for this rate relief.	Finance
Electric Vehicle Strategy and Action Plan Report.	To present to cabinet the Authority's Electric Vehicle Strategy and Action Plan to seek their views and approval.	Public Protection
VAT Exemption on the Supply of Sporting Services.	The report will provide Cabinet with details of a VAT exemption on sporting services and will seek approval to implement the exemption with effect from the 1st October 2018.	Finance

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16TH OCTOBER 2018	Key Issues	Service Area
Council's Annual Report for 2017/18.	To present to Cabinet the Authority's Annual Self-Assessment for 2017/18 to seek the views and approval prior to publication by 30th October 2018.	Policy
Strategy for the disposal of selected Land with Residential Development potential.	The report seeks Cabinet approval for the strategy for the disposal of five key medium to large parcels of land all of which are suitable for residential re-development.	Property Services
Strategic Equality Plan – Annual Monitoring and Improvement Report 2017-2018.	To update Members on the progress made during the financial year 2017/18 against targets in the Council's current Strategic Equality Plan and seek Cabinet approval for submission of the annual monitoring and improvement reports to the relevant commissions before the deadline dates.	Policy
Fields in Trust - Centenary Fields programme.	To seek the views of Cabinet on the formal dedication of the War Memorial Garden at Cwmfelinfach as part of the Fields in Trust, Centenary Fields programme.	Regeneration
Air Quality Options Appraisal.	To update members on the feasibility process for Hafod-yr-ynys and to discuss the potential options going forward for consideration and seek Cabinet approval to submit the required WeITAG Stage 2 report (containing those options) to Welsh Government.	Public Protection

17TH OCTOBER 2018	Key Issues	Service Area
Domiciliary Care Report.		Social Services
Children's Centre.		Social Services



## Cabinet Forward Work Programme (Scrutiny)

Recovery of Fly Tipping Clean Up Costs.	To consider a proposal that the Council takes steps to recover the costs of fly tipping against perpetrators of fly tipping incidents on Council land.	Public Protection
Public Services Board.		Policy
Capital Works.	To request cabinet approval for access to reserves to fund essential works in residential and respite properties to enable facilities budget to be used for planned maintenance and decoration in the same buildings.	Social Services

CABINET AS TRUSTEES OF BLACKWOOD MINERS' INSTITUTE – 17TH OCTOBER 2018	Key Issues	Service Area

Page 1

31ST OCTOBER 2018	Key Issues	Service Area
Parking Permits		Communities
Annual Improvements Report 2017/18.	The Annual Improvement Report (AIR) is a summary of the review work carried out by Wales Audit Office (WAO) during 2017/18. Individual reports will have been prepared throughout the year on specific matters but the AIR provides a collective summary. The AIR also includes the WAO's judgement on whether it believes that the Council is meeting its statutory requirements in relation to continuous improvement.	Performance

14TH NOVEMBER 2018	Key Issues	Service Area
Draft Sport and Active Recreation Strategy 2019-29.	To seek Cabinet's endorsement of the Draft Sport and Leisure Strategy.	Public Protection
Draft Budget Proposals for 2019/20.	This report will seek Cabinet endorsement of draft budget proposals for the 2019/20 financial year based on the Provisional Local Government Financial Settlement. This will then allow for a period of consultation prior to consideration of final 2019/20 budget proposals by Cabinet and Council in February 2019.	Finance
Grants 18/19 Overview – Regeneration.	This Report provides an evaluation of the current Regeneration Department's grant schemes and seeks Cabinet approval to combine the grants into a single " <b>Caerphilly Enterprise Fund</b> " with a refocus towards offering improved support to start-up businesses, stimulating economic growth, filling identified supply chain voids and supporting job creation.	Regeneration



## Cabinet Forward Work Programme (Scrutiny)

21st Century Schools.		Education
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28TH NOVEMBER 2018	Key Issues	Service Area
Whole Authority Mid-Year Revenue Budget Monitoring Report 2018/19.	The report will provide details of projected Whole-Authority revenue expenditure for the 2018/19 financial year along with details of any significant issues arising. The report will also update Cabinet on progress in delivering the approved savings for 2018/19.	Finance
Town Centre Events Programme.	To seek Cabinet approval for revision of the Council's current Town Centre Management model.	Planning
Future Lighting and Energy Saving Proposals.	To consider options available to achieve street lighting energy savings that could contribute to the Medium Term Financial Plan and mitigate energy cost increases.	Communities
Public Toilet Strategy.		Regeneration

12TH DECEMBER 2018	Key Issues	Service Area
Council Tax Base 2019/20.	The report provides details of the Council Tax base for 2019/20 for tax setting purposes and the collection percentage to be applied.	Finance

16TH JANUARY 2019	Key Issues	Service Area
Ystrad Mynach Masterplan.	To agree the Draft Ystrad Mynach Masterplan as a basis for a six week public consultation exercise to gauge stakeholders views on the draft proposals for the area.	Regeneration

CABINET AS TRUSTEES OF BLACKWOOD MINERS' INSTITUTE – 16TH JANUARY 2019	Key Issues	Service Area
Annual Report and Statement of Accounts for 2017/20.		Communities

30TH JANUARY 2019	Key Issues	Service Area



## Cabinet Forward Work Programme (Scrutiny)

Corporate Risk Register.	To provide an update of the Corporate Risk Register in accordance with the Council's Risk Management Strategy. The updated Corporate Risk Register (CRR) is presented to Audit Committee so there is opportunity for the Committee to satisfy itself that appropriate arrangements are in place for the council's risk management processes to be regularly and robustly monitored and scrutinised.	Policy
Update on Reserves.	To present details of the usable reserves held by the Authority and to outline proposals for the use of reserves in some areas.	Finance
Housing Revenue Account Charges 2019/20.	To present details of proposed increases in rent charges for the 2019/20 financial year.	Finance

<b>13TH FEBRUARY 2019</b>	<b>Key Issues</b>	<b>Service Area</b>
Budget Proposals 2019/20 and Medium-Term Financial Strategy 2019/2024.	This report will seek Cabinet endorsement of final budget proposals for the 2019/20 financial year prior to them being presented to Council on the 21st February 2019.	Finance

<b>27TH FEBRUARY 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>13TH MARCH 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>27TH MARCH 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>10TH APRIL 2019</b>	<b>Key Issues</b>	<b>Service Area</b>





## Cabinet Forward Work Programme (Scrutiny)

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<b>CABINET AS TRUSTEES OF BLACKWOOD MINERS' INSTITUTE – 10TH APRIL 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>24TH APRIL 2019</b>	<b>Key Issues</b>	<b>Service Area</b>
<b>15TH MAY 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>29TH MAY 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>12TH JUNE 2019</b>	<b>Key Issues</b>	<b>Service Area</b>

<b>26TH JUNE 2019</b>	<b>Key Issues</b>	<b>Service Area</b>



## Cabinet Forward Work Programme (Scrutiny)

10TH JULY 2019	Key Issues	Service Area

CABINET AS TRUSTEES OF BLACKWOOD MINERS' INSTITUTE – 10TH JULY 2018	Key Issues	Service Area

14TH JULY 2019	Key Issues	Service Area



## EDUCATION FOR LIFE SCRUTINY COMMITTEE - 25TH SEPTEMBER 2018

**SUBJECT: PUPIL ATTAINMENT AT FOUNDATION PHASE, KEY STAGE 2 AND KEY STAGE 3 - 2017**

**REPORT BY: CHALLENGE ADVISER - SERVICE STRATEGIC AND POLICY LEAD, EDUCATION ACHIEVEMENT SERVICE (EAS)**

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### 1. PURPOSE OF REPORT

- 1.1 To inform members of pupils' attainment in teacher assessment at Foundation Phase, Key Stage 2 and Key Stage 3.

### 2. SUMMARY

- 2.1 All schools are subject to rigorous reporting and monitoring of standards each year, with the principal focus in key stages 2 and 3 being on English/Welsh first language, mathematics and science, and the percentage of pupils achieving the expected level in all three core subjects – the core subject indicator (CSI).
- 2.2 In the Foundation Phase schools report on the performance of 7 year olds in language, literacy and communication (English or Welsh language) (LLC), mathematical development (MD), and personal and social development, wellbeing and cultural development (PSDWCD). The foundation phase indicator (FPI) measures the percentage achieving the expected outcome in all three areas of learning.
- 2.3 Whilst assessment of LLC and MD is broadly comparable to performance in English/Welsh and mathematics at KS2 and KS3, PSDWCD is not the same as science. Instead it provides a holistic assessment of pupils' wellbeing and the extent to which they are able to inter-relate appropriately with those around them. It also reflects a growing awareness of culture and diversity and of the environment in which they live. As such, it is an important measure of their overall 'readiness' for learning. Achievement in each of LLC, MD and PSDWCD is measured in relation to one of six 'outcome' descriptors.

#### **Expected levels of achievement at the end of foundation phase, key stage 2 and key stage 3:**

- 2.4 The 'average' pupil is expected to achieve outcome 5 by the end of the foundation phase (formerly national curriculum level 2), with more able pupils achieving outcome 6 (formerly level 3).
- 2.5 At the end of key stages 2 and 3, the 'average' pupil is expected to achieve level 4 and above and level 5 and above respectively and more able pupils are expected to achieve level 5 and 6 respectively.
- 2.6 In addition to performance at the expected level, it is important also to analyse performance at the Expected Level + 1 at each stage.

- 2.7 This report contains aggregate data for the Local Authority as whole, aggregated from data submitted by schools as part of the National Data Collection process in June 2018.

**Update on changes in accountability frameworks using Teacher Assessment Data (Foundation Phase, key stage 2 and 3)**

- 2.8 In agreement with LA Directors the EAS is offering a series of workshops for elected members in each LA, in September 2018. In Caerphilly this seminar will take place on 27<sup>th</sup> September, 2018. These described changes to key documents and regional approaches for the academic year 2018/2019, in relation to national changes to assessment and accountability arrangements. A summary is provided below.

The written statement from the Cabinet Secretary (17 May 2018) includes the following comment on the use of both Teacher Assessment and National Test data for accountability purposes:

“We have consulted on ceasing the publication of Teacher Assessment data below the national level. This will help shift focus back to pupil assessment rather than data wrongly being used as part of a high stakes accountability system. We have consulted on the use of National Reading and Numeracy test data. I want to make it clear that data from these tests are not used as part of the accountability system.”

2.9 **Summary of key items for schools that will cease:**

- School Comparative Report (including National Tests)
- All Wales Core Data Sets (AWCDS) – Foundation Phase, Key Stage 2, Key Stage 3 performance packs
- National Categorisation – primary and secondary Step 1 data
- My local school updates – FP, KS2, KS3

**Summary of key items for schools that will continue:**

- 2.10 For 2018/2019 the EAS will continue to provide a slightly reduced EAS School Data Profile to assist with internal school level self-evaluation activity only. This will continue to include a National Test summary for school level information only. These will be available for schools on School Secure from the second week in September.

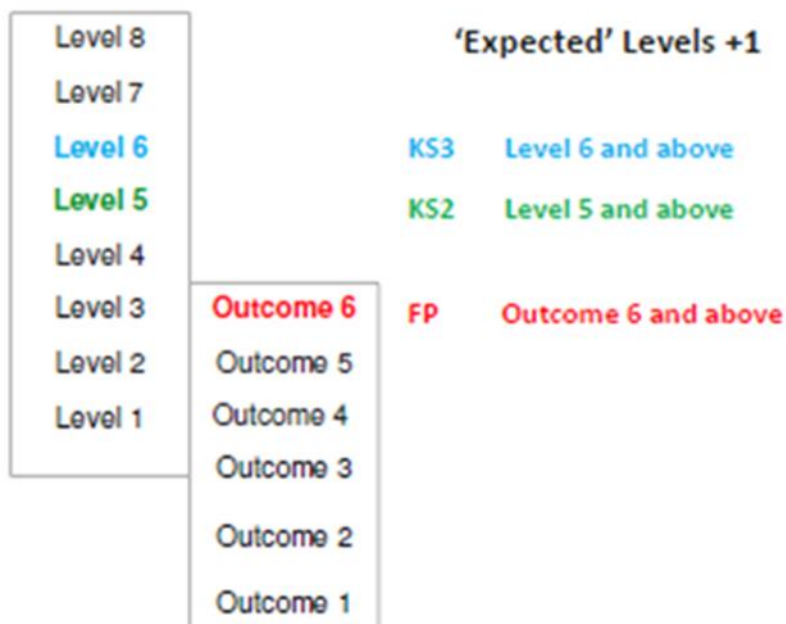
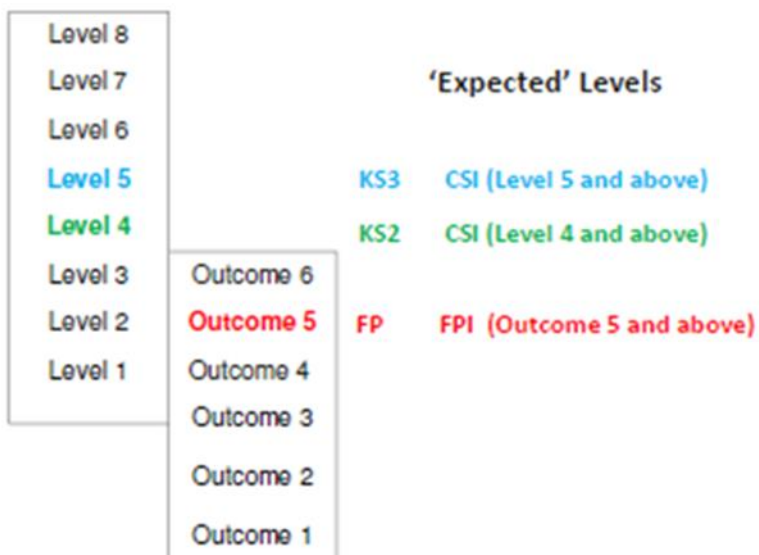
**Implications for Local authorities**

- 2.11 For 2018/2019 the EAS has provided a reduced scrutiny report. The main changes are:

- No comparison with other LAs (rank positions)
- No school level data
- No benchmark summaries

**Information on National Tests:**

- 2.12 As noted above in the statement from the Cabinet Secretary for 2018/2019 information from the National Tests will not be included in Scrutiny papers.



<b>Cohort sizes</b>	<b>Number of pupils</b>	<b>1 pupil represents</b>
Foundation Phase	2195	0.05%
Key Stage 2	2051	0.05%
Key Stage 3	2056	0.05%

### 3. LINKS TO STRATEGY

- Children and Families (Wales) Measure 2010
- Child Poverty Strategy for Wales
- Child Poverty Strategy 2014 – 2017 (UK)
- Improve Education Opportunities for all (Corporate Improvement Plan 2018-2023)
- The Public Services Board Well-being Plan
- The EAS Business Plan

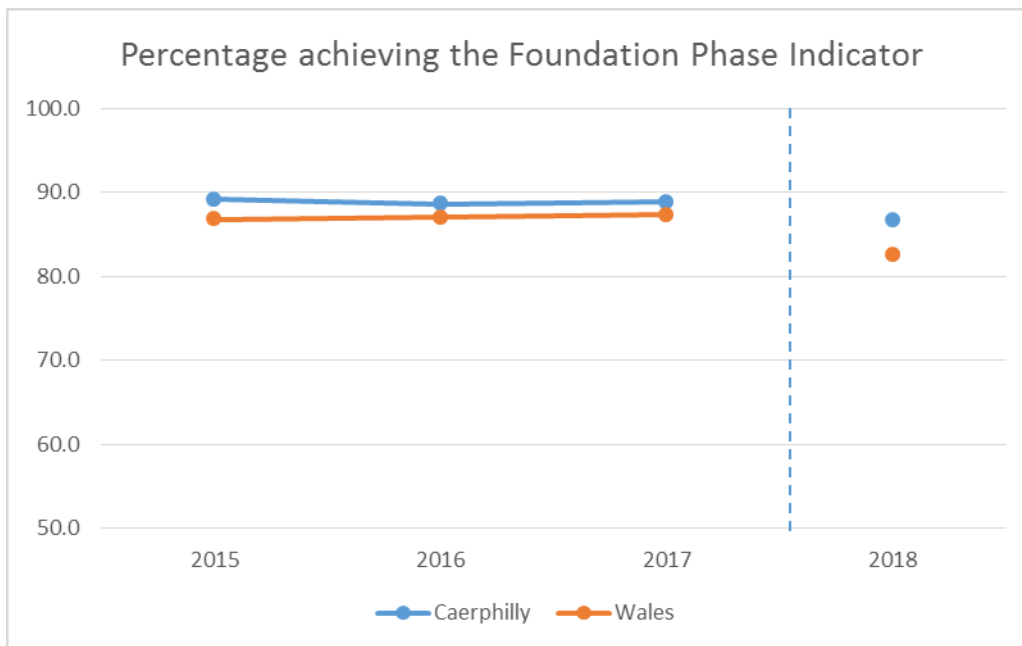
### 4. THE REPORT

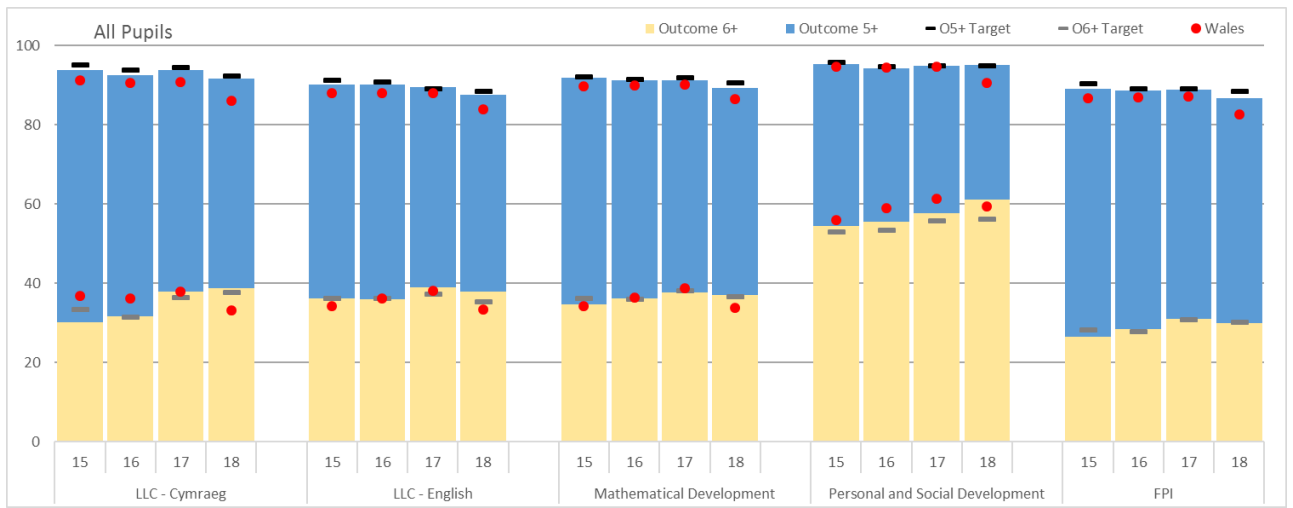
#### 4.1 Foundation Phase

4.1.1 In October 2014 the Foundation Phase Areas of Learning (AoL) were revised to align with the National Literacy and Numeracy Framework, as well as make them more demanding. They were introduced on a statutory basis from September 2015. This means that the cohort of children that started Reception in September 2015 were the first children to be formally assessed against the revised outcomes at the end of the Foundation Phase in the summer of 2018.

**Comparisons of Foundation Phase outcomes with previous years should, therefore, be avoided as they are not measured on a comparable basis.**

4.1.2 In the foundation phase 86.7% pupils achieved the foundation phase indicator (FPI) in 2018.





#### 4.1.3 Percentage of pupils achieving Outcome 5+:

	FPI	LLC English	LLC Welsh	Mathematical Development	PSD
<b>Caerphilly 2018</b>	86.7 ↓	87.6 ↓	91.7 ↓	89.4 ↓	95.1 ↑
<b>Target</b>	88.5	88.4	92.4	90.6	94.8
<b>Caerphilly 2017</b>	88.9	89.6	93.8	91.2	95.0
<b>Wales 2018</b>	82.6	84.0	86.1	86.6	93.4

#### 4.1.4 Percentage of pupils achieving Outcome 6+:

	LLC English	LLC Welsh	Mathematical Development	PSD
<b>Caerphilly 2018</b>	37.9 ↓	38.8 ↑	37.2 ↓	61.1 ↑
<b>Target</b>	35.3	37.8	36.6	56.3
<b>Caerphilly 2017</b>	38.9	38.0	37.8	57.8
<b>Wales 2018</b>	33.5	33.2	33.9	59.4

4.1.5 Performance in the Foundation Phase Indicator was 86.7%.

4.1.6 Performance in LLC English was 87.6% at O5+ and 37.9% at O6+.

4.1.7 Performance in LLC Welsh was 91.7% at O5+ and 38.8% at O6+.

4.1.8 Performance in mathematical development was 89.4% at O5+ and 37.2% at O6+.

4.1.9 Performance in PSD was 95.1% at O5+ and 61.1% at O6+.

4.1.10 Gender differences at outcome 5+ (boys' performance – girls' performance):

	FPI		LLC English		LLC Welsh		Mathematical Development		PSD	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
<b>Caerphilly</b>	-6.1	-9.9	-6.9	-9.4	-4.6	-7.8	-4.0	-6.8	-4.2	-5.8
<b>Wales</b>	-7.1	-8.5	-7.2	-8.3	-6.0	-8.9	-4.1	-4.8	-5.0	-5.7

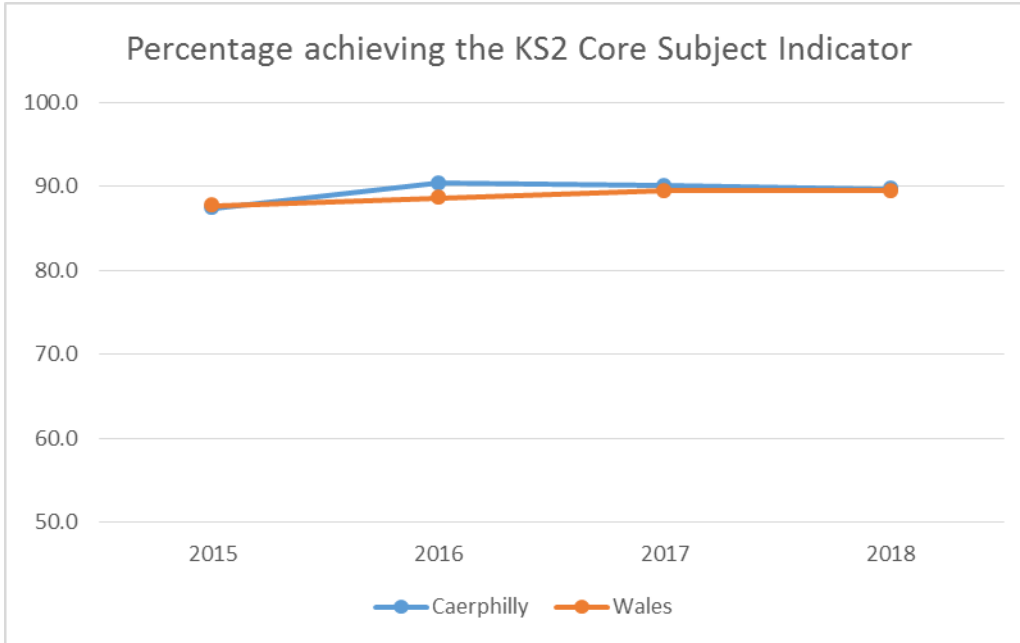
4.1.11 Gender differences at outcome 6 (boys' performance – girls' performance):

	LLC English		LLC Welsh		Mathematical Development		PSD	
	2017	2018	2017	2018	2017	2018	2017	2018
<b>Caerphilly</b>	-7.3	-9.7	-9.8	-15.8	0.9	-1.7	-13.0	-20.0
<b>Wales</b>	-12.7	-10.8	-13.7	-13.6	-0.9	0.3	-18.0	-18.5

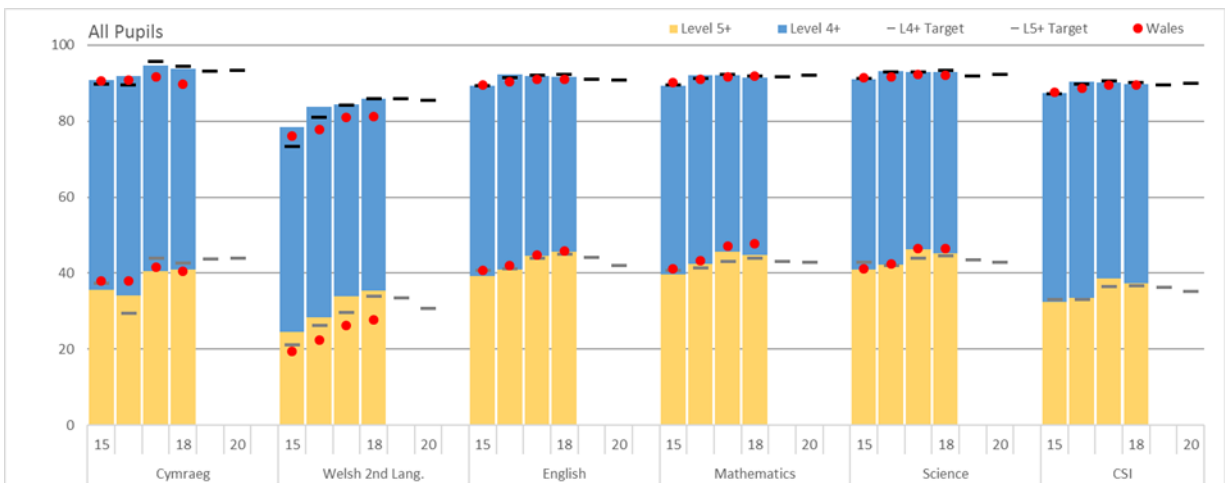
4.1.12 At outcomes 5+ and 6+ the gender gaps are wider than that across Wales except for LLC Welsh.

## 4.2 Key Stage 2

4.2.1 Performance declined slightly in 2018, with 89.7% pupils achieving the core subject indicator (CSI), 0.4 percentage points below 90.1% in 2017.



4.2.2 Performance at the expected level (4+) has declined in all areas except Welsh 2nd language. At level 5+, performance has improved in all subjects except maths and science.







4.2.3 Percentage of pupils achieving level 4+:

	CSI	English	Welsh (First Language)	Mathematics	Science
Caerphilly 2018	89.7 ↓ -1.0	91.6 ↓ -1.0	93.8 ↓ -1.0	91.4 ↓ -1.0	92.8 ↓ -1.0
Target	90.1	92.2	94.4	91.7	93.3
Caerphilly 2017	90.1	91.8	94.7	92.1	92.9
Wales 2018	89.5	91.1	89.7	91.8	92.1



4.2.4 Percentage of pupils achieving level 5+:

	English	Welsh (First Language)	Mathematics	Science
Caerphilly 2018	45.6  1.0	41.0  1.0	44.8  -1.0	45.3  -1.0
Target	44.9	42.5	43.9	44.5
Caerphilly 2017	44.5	40.5	45.7	46.3
Wales 2018	45.9	40.4	47.8	46.5

4.2.5 Performance in the CSI has declined slightly by 0.4 percentage points.










4.2.6 Performance in English at the expected level 4+ has declined slightly by 0.2 percentage points. Performance at the higher level 5+ has improved by 1.1 percentage points.

4.2.7 Performance in Welsh (first language) at the expected level 4+ has declined by 0.9 percentage points. Performance in Welsh (first language) at the higher level 5+ has improved by 0.5 percentage points.

4.2.8 Performance in mathematics at the expected level 4+ has declined by 0.7 percentage points. Performance in mathematics at the higher level 5+ has declined by 0.9 percentage points.







4.2.9 Performance in science at the expected level 4+ is stable at 92.8%. Performance in science at the higher level 5+ has declined by 1.0 percentage point.

4.2.10 Gender differences at level 4+ (boys' performance – girls' performance):

	CSI		English		Welsh (First Language)		Mathematics		Science	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Caerphilly	-4.0	-6.0	-4.8	-6.4	-5.6	-6.3	-2.2	-3.4	-3.2	-4.2
Wales	-4.5	-5.2 	-5.0 	-5.7 	-6.0 	-6.5 	-2.8 	-3.0 	-3.4 	-4.1 

4.2.11 At level 4+ gender differences have decreased in each subject area except Welsh. Gender differences are wider than the national gender differences in all subjects except Welsh.

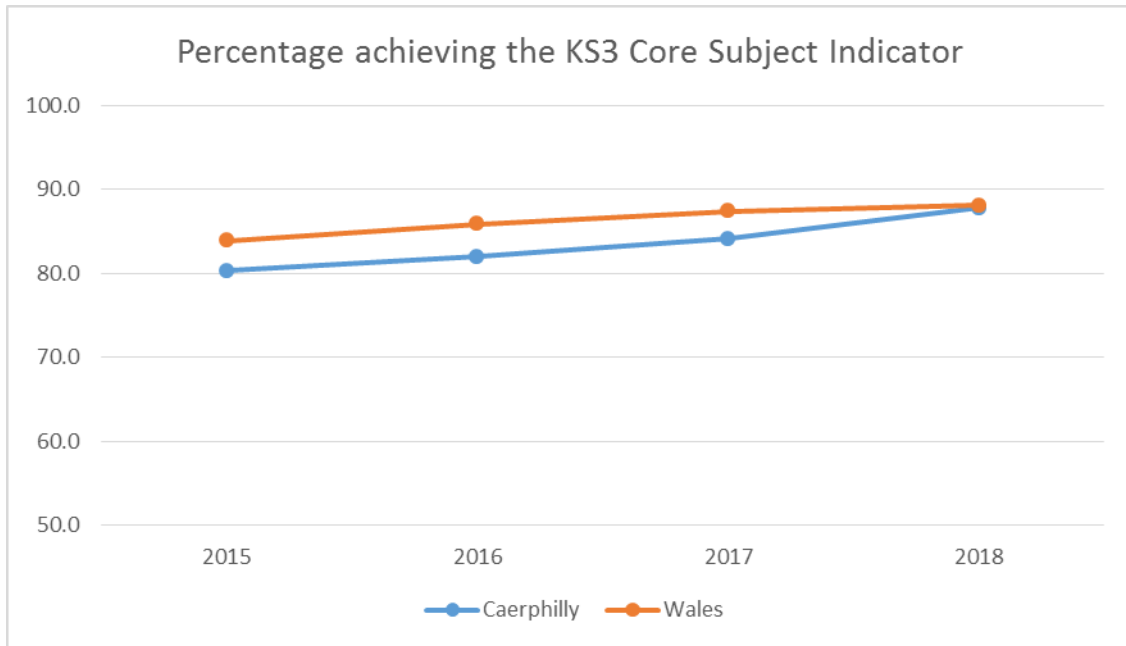
4.2.12 Gender differences at level 5+ (boys' performance – girls' performance):

	English		Welsh (First Language)		Mathematics		Science	
	2017	2018	2017	2018	2017	2018	2017	2018
Caerphilly	-13.8	-15.9	-22.7	-13.4	-4.4	-3.0	-9.2	-8.6
Wales	-12.9	-13.3 	-17.3 	-14.3 	-0.8	0.1 	-5.2 	-5.4 

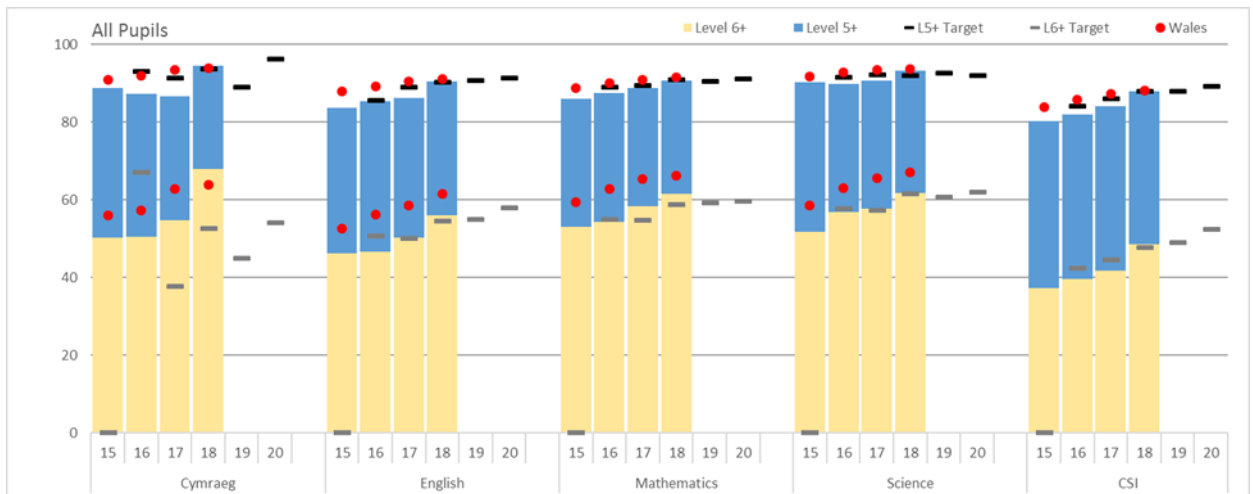
4.2.13 At level 5+ gender differences have decreased for all subjects except English. The gender gaps are still wider than the national averages except for Welsh.

### 4.3 Key Stage 3

4.3.1 Performance continues to improve, with 87.8% pupils achieving the core subject indicator (CSI), an increase of 3.7 percentage points from 84.1% in 2017.







4.3.2 Performance has improved across all indicators at expected level 5+, level 6+ and level 7+..







4.3.3 Percentage of pupils achieving level 5+

	CSI	English	Welsh (First Language)	Mathematics	Science
<b>Caerphilly 2018</b>	87.8 ↑	90.4 ↑	94.4 ↑	90.8 ↑	93.3 ↑
<b>Target</b>	87.9	90.2	93.8	90.9	92.0
<b>Caerphilly 2017</b>	84.1	86.2	86.6	88.9	90.7
<b>Wales 2018</b>	88.1	91.2	93.8	91.6	93.7

#### 4.3.4 Percentage of pupils achieving level 6+

	English	Welsh (First Language)	Maths	Science
Caerphilly 2018	55.9  1.0	67.9  1.0	61.5  1.0	61.7  1.0
Target	54.6	52.6	58.8	61.6
Caerphilly 2017	50.2	54.7	58.4	57.6
Wales 2018	61.6	61.6	66.3	67.1

#### 4.3.5 Percentage of pupils achieving level 7+

	English	Welsh (First Language)	Maths	Science
Caerphilly 2018	17.0  1.0	23.0  1.0	27.4  1.0	22.8  1.0
Caerphilly 2017	14.1	12.1	20.0	19.5
Wales 2018	23.4	23.4	32.7	28.0

4.3.6 Performance in the CSI has improved by 3.7 percentage points.

4.3.7 Performance in English at the expected level 5+ has improved by 4.2 percentage points. Performance in English at level 6+ and level 7+ has improved by 5.7 and 2.9 percentage points respectively.

4.3.8 Performance in Welsh first language at the expected level 5+ has improved by 7.8 percentage points. Performance in Welsh at level 6+ and level 7+ has improved by 13.2 percentage points and 10.9 percentage points respectively.

4.3.9 Performance in mathematics at the expected level 5+ has improved by 0.9 percentage points. Performance in mathematics at level 6+ and level 7+ has improved by 3.1 and 7.4 percentage points respectively.

4.3.10 Performance in science at the expected level 5+ has improved by 2.6 percentage points. Performance in science at level 6+ and level 7+ has improved by 4.1 and 3.3 percentage points respectively.

4.3.11 Gender differences at level 5+ (boys' performance – girls' performance):

	CSI		English		Welsh (First Language)		Mathematics		Science	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
Caerphilly	-8.8	-11.0	-8.2	-9.9	-11.6	-3.6	-5.3	-8.6	-5.5	-6.9
Wales	-7.4	-7.1	-7.2	-7.0	-4.8	-5.6	-4.4	-4.2	-4.4	-4.6

4.3.12 Gender differences have increased for all indicators except Welsh first language, and are still wider than the Wales average gender difference.

4.3.13 Gender differences at level 6+ (boys' performance – girls' performance):

	English		Welsh (First Language)		Mathematics		Science	
	2017	2018	2017	2018	2017	2018	2017	2018
Caerphilly	-20.1	-19.5	-16.9	-20.3	-7.5	-11.5	-13.4	-14.4
Wales	-18.5	-18.4	-19.1	-20.3	-7.2	-6.3	-12.1	-12.0

Gender differences have increased for all subjects except English, and are still wider than the Wales average gender difference.

4.3.14 Gender differences at level 7+ (boys' performance – girls' performance):

	English		Welsh (First Language)		Mathematics		Science	
	2017	2018	2017	2018	2017	2018	2017	2018
<b>Caerphilly</b>	-8.9	-10.2	-11.6	-15.7	-5.1	-7.0	-7.4	-9.0
<b>Wales</b>	-12.6	-14.1	-11.9	-13.2	-4.0	-4.7	-8.0	-9.2

Gender differences have increased for all subjects, and are wider than the Wales average gender difference in all subjects except English.

4.3.15 Despite the dip in performance this year the Foundation Phase Indicator (FPI) is still above the Wales average and the CSI at KS2 is 0.2% below the Wales average. Performance at KS3 has continued to improve, together with the outcomes for the more able pupils across all key stages. It is important to analyse carefully the dips at Foundation Phase and KS2 to ensure that this trend does not continue.

#### 4.4 Provisional KS4 results

4.4.1 Please note that this section is compiled using provisional data provided by schools on exam results day. This data is subject to a validation process throughout September and October. Final confirmed data is not likely to be available until December 2018. A full analysis will be provided on the final validated data set.

	Cohort Number	% L2 E,W+M		
		2017	2018	2018 Target
Caerphilly	1897	49.9	47.1	59.5
<b>EAS - South East Wales</b>	<b>5947</b>	<b>52.9</b>	<b>51.5</b>	<b>60.9</b>
<b>Wales</b>		<b>54.6</b>		

4.4.2 Early indications are that the performance at Key Stage 4 has declined, although we await the updated profile when equivalence and re-marking processes are completed. In depth analysis of, and amended support levels for schools will be discussed and agreed by the LA and EAS early this month, and a detailed breakdown of performance in KS4 and KS5 will be presented to a future Scrutiny meeting when data is verified. It is acknowledged that education performance continues to be the main priority for the Council for the coming years.

## 5. WELL-BEING OF FUTURE GENERATIONS

5.1 This report contributes to the Well-being Goals as set out in Links to Strategy above. It is consistent with the five ways of working as defined within the sustainable development principle in the Act. Schools work collaboratively with the Local Authority Education and wider staff team and the Education Achievement Service to ensure pupils are supported to attain their educational outcomes and therefore offer long term opportunities for their future careers. They involve parents and pupils in the educational pathway to support their attainment and also enable access to preventative services if family needs are identified. This report identifies the impact of using the five ways of working in schools for pupils across the borough.

## **6. EQUALITIES IMPLICATIONS**

- 6.1 There is no specific equalities impact in relation to the content of this report. When performance information is discussed with schools as part of the monitoring, challenge, support and intervention programme, all Equalities and Welsh Language issues are taken into account, where relevant. Similarly the Local Authority self-evaluation considers all equalities issues, and data is also gathered on discriminatory bullying incidents each term as this can impact on attainment figures for pupils who fall under any of the protected characteristics.

## **7. FINANCIAL IMPLICATIONS**

- 7.1 There are no financial implications.

## **8. PERSONNEL IMPLICATIONS**

- 8.1 There are no personnel implications within this report.

## **9. CONSULTATIONS**

- 9.1 The views of all consultees listed have been incorporated in this report.

## **10. RECOMMENDATIONS**

- 10.1 That Members note the content of this report.

## **11. REASONS FOR THE RECOMMENDATIONS**

- 11.1 To keep Members informed of standards achieved by Caerphilly learners at the end of foundation phase, key stage 2 and key stage 3.

## **12. STATUTORY POWER**

- 12.1 Children and Families Measure (Wales) 2010.  
12.2 Local Government Measure 2009.  
12.3 Education Act 1996.

Authors: Ed Pryce, Challenge Adviser – Service Strategic & Policy Lead (EAS)  
Keri Cole, Chief Education Officer

Consultees: Christina HARRY, Interim Chief Executive  
Ed Edmunds, Corporate Director, Education and Corporate Services  
Councillor Philippa Marsden, Cabinet Member, Education and Achievement  
Councillor Derek Harvard, Chair of Education Scrutiny Committee  
Councillor Carol Andrews, Vice Chair of Education Scrutiny Committee  
Lynne Donovan, Head of People Services  
Anwen Cullinane, Senior Policy Officer (Equalities and Welsh Language)  
Sue Richards, Head of Education Planning and Strategy  
Sarah Ellis, Lead for Inclusion and ALN  
Paul Warren, Strategic Lead for School Improvement  
Jane Southcombe, Finance Manager (Education, Lifelong Learning & Schools)  
Ros Roberts, Performance Manager  
Stephen Harris, Deputy Section 151  
Lisa Lane, Interim Monitoring Officer  
Nicole Scammell, Head of Corporate Finance

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## EDUCATION FOR LIFE SCRUTINY COMMITTEE - 25TH SEPTEMBER 2018

**SUBJECT: BUDGET MONITORING 2018/19**

**REPORT BY: CHIEF EDUCATION OFFICER**

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### **1. PURPOSE OF REPORT**

- 1.1 To outline the projected 2018-19 outturn position for the Directorate of Education and Lifelong Learning (LL), based on the most recent information available.

### **2. SUMMARY**

- 2.1 The report identifies projected under / overspends currently forecast for 2018-19 (full details attached in Appendix 1), together with an update with regards to any issues relating to the progress of the 2018/19 savings targets.

### **3. LINKS TO STRATEGY**

- 3.1 The report considers the use of resources within the Directorate to ensure that key strategies are achieved.
- 3.2 Effective financial planning and financial controls contribute to the Well-being Goals within the Well-being of Future Generations Act (Wales) 2015. In particular as follows:

A healthier Wales, supporting vulnerable learners can improve their well-being and educational achievement.

A more equal Wales, a society that enables people to fulfil their potential no matter what their background is; and

A Wales of cohesive communities, improving quality of life with attractive, viable, safe and well connected communities.

### **4. THE REPORT**

- 4.1 The report deals with the budget monitoring information for Education and Lifelong Learning (LL). The revenue position for the Directorate is summarised in Appendix 1, with a breakdown for the 3 service areas of Planning & Strategy; Learning, Education and Inclusion (LEI); and LL respectively.
- 4.2 The projected outturn position is based on actual income and expenditure details to the end of July 2018, together with data used to forecast income and expenditure. Account is also taken of the outturn position for 2017-18 and information available following discussions with Managers.

- 4.3 A net overspend of £438k is currently forecast, details with regards to each of the service areas are outlined below.
- 4.4 Members are advised that the projected outturn position for Corporate Services is an underspend of £1.475m, consequently overall the projected outturn position for Education and Corporate Services is an underspend of £1.037m. The details with regards to the Corporate Services position will be reported to Policy & Resources Committee in October 2018.

**4.5 Planning & Strategy (Including Home to School Transport) – (Overspend £76k)**

- 4.5.1 The main variances in this service area relate to the following:

	£'000 (Under / (Over))
Relief Supply Cover (SRB's & Maternity)	(121)
Management & Support Service Costs	58
Home to School / College Transport	(18)
Net Other	5
<hr/>	
Total	(76)

- 4.5.2 Due to the unpredictability of sickness in our Special Resource Bases and maternity absences across all school sectors, the relief supply cover spend on school based staff is always very closely monitored. Whilst it is very difficult to be able to forecast an outturn position, current data identifies an increase in maternity absences in our schools and previous trends suggest there will be an increased sickness pressure in the winter months. Monitoring is on-going due to the volatility and uncertain nature of the spend. This projected in year overspend has already been reduced on the assumption that the Directorate will need to access funding of £39k in balances (Relief Supply Equalisation Account – this is the full balance currently held in balances for this purpose).

- 4.5.3 The underspend in relation to Management & Support costs relates predominantly to in year savings on staff costs. This variance is due largely to in year vacancies that are not on-going as posts are linked to delivering support through SLA Agreements with our Schools.

- 4.5.4 Another potential budget pressure in 2018-19 relates to the Home to School College Transport Budget. As Members are aware this area of the service is managed by the Engineering Division (with any variances ring fenced to Education). The current in year projection is an overspend of £40k, this is reduced by a contribution of circa £22k, which is the full amount held in balances against the Transport Equalisation Account. This position will be reviewed in September / October following the renewal of a number of our transport contracts.

- 4.5.5 In summary the net projected variance for Planning & Strategy is an overspend of £76k.

**4.6 Learning, Education & Inclusion – (Overspend £586k)**

- 4.6.1 The most significant variances within LEI are as follows:

	£'000 (Under / (Over))
Behaviour Support	29
14 – 19 Initiative Transport	24
EOTAS / Addn. Support / Out of County	(830)
Early Years – Rising 3's	50
Early Years Central Team	79
Education Achievement Contract	28
Education Improvement Grant (Match)	27
Net Other	7
<hr/>	
Total	(586)



- 4.6.2 The underspend in the Behaviour Support budget is linked to in year staff savings, this includes a maternity absence in the early part of the financial year.
- 4.6.3 The projected underspend on 14-19 transport (which allows pupils wider course access between Schools), is a trend that continues into 2018-19. This spend will continue to be monitored with a view to a potential savings proposals moving forwards.
- 4.6.4 The significant cost pressure within the Directorate continues to be in relation to the EOTAS (Education Other Than at School) provision. The provision accommodates learners who are unable to attend and learn in a mainstream school setting. In reviewing the continuum of additional support provided to pupils, our alternative EOTAS provision and Out of County Placements, the projected overspend against this budget heading is currently estimated at £830k. A review of demand, costs and structures is on-going. In recent years, savings in other areas of the Directorate have contributed towards funding this pressure, with the Directorate underspending as a whole. Based on projections for 2018/19 this will not be possible in the current year and going forwards.
- 4.6.5 The spend on Early Years – Rising 3's is very much demand led, as it is driven by the number of age 3 pupils who access nursery provision in the term following their 3<sup>rd</sup> birthday. This can vary from year to year, with spend based on the birth rate and parental choice with regards to accessing this “early” provision. Current projections do not indicate a significant increase in uptake, consequently based on recent trends the current projection is a saving of £50k. This budget will be monitored for a potential realignment in the future, with consideration given to any impact as a result of the roll-out of the Childcare Offer across the Borough. .
- 4.6.6 The projected underspend against the Early Years Central Team is consistent with the position in 2017/18 and is largely due to successfully accessing grant funding to contribute towards supporting specific posts within the Team.
- 4.6.7 In 2018-19, the charge on the main contract with the Education Achievement Service is less than current budget provision. Similarly the budget for the Authority’s match funding requirement against the Education Achievement Grant is greater than required. These variances will be reviewed as part of savings proposals for future years.
- 4.6.8 In summary, the net projected variance for Learning, Education & Inclusion is an overspend of £586k.

**4.7 Life Long Learning – (Underspend £224k)**

4.7.1 In 2018-19 the main budget variances are as follows:

	£'000 (Under / (Over))
Community Education (Adult & Youth)	45
Library Service	178
Net Other	1
<b>Total</b>	<b>224</b>

- 4.7.2 The projected underspend within Community Education relates predominantly to Adult Education. This is attributable to a vacant management post following a retirement and a further in year vacancy gap.
- 4.7.3 The Libraries variance relates primarily to a one off rebate for NNDR (National Non Domestic Rate) charges of £130k. This refund relates to 4 libraries covering financial year 2010/11 through to 2017/18. A further projected net saving of £48k relates largely to in year vacancies and supply cover arrangements.

#### **4.8 Progress Made Against the 2018/19 Revenue Budget Savings Targets**

- 4.8.1 The 2018/19 revenue budget settlement for Education and Lifelong Learning included a specific savings target of £1,221k. Managers have progressed implementation of the targets set and there are currently no significant issues causing concern. The impact has been referenced in the narrative of this report and the projected outturn position for 2018-19.
- 4.8.2 Members will be aware that the revenue budget of £333k for Maintenance of School Buildings (50/50 Funding with Schools) formed part of the £1,221k savings target for 2018-19. In 2018-19, the Authority has continued to support building maintenance projects on a 50/50 basis with our Schools by accessing funds from LMS Contingency balances. The details of planned expenditure are contained in the Education Capital Report 2018/19, which went to Education for Life Scrutiny on 26<sup>th</sup> February 2018.

#### **5. WELL-BEING OF FUTURE GENERATIONS**

- 5.1 Effective financial management is a key element in ensuring that the Well-being Goals within the Well-being of Future Generations Act (Wales) 2015 are met.

#### **6. EQUALITIES IMPLICATIONS**

- 6.1 Equality Impact Assessments (EIA's) have been completed for all the savings proposals in 2018/19 that are anticipated to have a public impact.

#### **7. FINANCIAL IMPLICATIONS**

- 7.1 In summary, based on information currently available there is a projected revenue overspend for Education & Lifelong Learning of £438k.
- 7.2 In 2018/19 there are a number of one off savings which have assisted with regards to reducing the projected overspend position, most notably an NNDR net refund of £130k within the Library Service. In addition current projections assume that circa £61k is utilised from 2 earmarked equalisation accounts. However it's important to be clear that the pressures relating to Relief Supply & Maternity and Transport costs are not linked to a mismatch with regards to the number of school days that fall in the 2018/19 financial year.
- 7.3 At this early stage in the year, there are a number of estimates and assumptions that could change due to the uncertain nature of some of the service areas.
- 7.4 Overall the current projected outturn position for Education & Corporate Services is an underspend of £1.037m.

#### **8. PERSONNEL IMPLICATIONS**

- 8.1 In 2018-19 the Directorate will continue with the strategy of prudent vacancy management.
- 8.2 The budget proposals include provision to pay the living wage, as agreed by Council.
- 8.3 In striving to achieve these budget proposals the service area will have regard to the Council's Workforce Flexibilities Policies. However, should employees still be placed at risk, either through the achievement of any agreed budget savings or grant funding reductions, they will be supported via the appropriate Council policies relating to redeployment and ultimately redundancy if necessary. The Service will also utilise other policies as appropriate e.g. voluntary severance.

## **9. CONSULTATIONS**

9.1 There are no consultation responses that have not been reflected in this report.

## **10. RECOMMENDATIONS**

10.1 Members are requested to note the contents of this report and the detailed budget monitoring information contained in Appendix 1.

## **11. REASONS FOR THE RECOMMENDATIONS**

11.1 The Council Budget is based on the achievement of both expenditure and income targets. In order to ensure that these are met and the Council's financial integrity maintained Directors are required to review income and expenditure trends.

## **12. STATUTORY POWER**

12.1 Local Government Act 1972.

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Keri Cole, Chief Education Officer  
Sue Richards, Head of Service – Education, Planning & Strategy  
Sarah Ellis, Lead for Inclusion & ALN  
Sarah Mutch, Early Years Manager  
Paul Warren, Strategic Lead for School Improvement  
Councillor Philippa Marsden, Cabinet Member for Education and Achievement  
Nicole Scammell, Head of Corporate Finance & Section 151  
Steve Harris, Interim Head of Business Improvement Services, Corporate Services  
Lisa Lane, Interim Monitoring Officer  
Robert Tranter, Head of Legal Services & Monitoring Officer  
Councillor Barbara Jones, Deputy Leader and Cabinet Member for Finance, Performance and Governance  
Mike Eedy, Finance Manager (Environment Directorate)  
Anwen Cullinane, Senior Policy Officer (Equalities & Welsh Language)  
Julie Baker, Principal Finance Officer (Schools)  
Mike Lewis, Principal Accountant Education  
Lynne Donovan, Head of People Services  
Dave Roberts, Principal Group Accountant (Financial Advice & Support)

Appendices:

Appendix 1: Projected Revenue Outturn Figures 2018-19

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<b>EDUCATION &amp; LIFELONG LEARNING</b>	<b>Original Estimate 2018-19 £</b>	<b>Estimated Outturn 2018/19 £</b>	<b>Variance Under (Over) 2018/19 £</b>
<b><u>SUMMARY</u></b>			
<b>PLANNING and STRATEGY</b>	<b>104,976,523</b>	<b>105,052,440</b>	<b>(75,917)</b>
<b>LEARNING, EDUCATION and INCLUSION</b>	<b>15,237,131</b>	<b>15,823,125</b>	<b>(585,994)</b>
<b>LIFELONG LEARNING</b>	<b>4,350,049</b>	<b>4,126,499</b>	<b>223,550</b>
<b>TOTAL SERVICE EXPENDITURE (Revenue)</b>	<b>124,563,703</b>	<b>125,002,064</b>	<b>(438,361)</b>

<b>EDUCATION &amp; LIFELONG LEARNING</b>	<b>Original Estimate 2018-19 £</b>	<b>Estimated Outturn 2018/19 £</b>	<b>Variance Under (Over) 2018/19 £</b>
<b><u>PLANNING and STRATEGY</u></b>			
<i>Individual Schools Budget</i>	<b>102,404,172</b>	<b>102,404,172</b>	<b>0</b>
<i>Post 16 Initiative (Grant Income)</i>	<b>(4,003,381)</b>	<b>(4,003,381)</b>	<b>0</b>
<i>Earmarked Formula Funding (inc. Joint Use Sites)</i>	<b>214,064</b>	<b>214,115</b>	<b>(51)</b>
<i>Schools LMS Contingencies</i>	<b>192,687</b>	<b>192,687</b>	<b>0</b>
<b><i>Other Direct School Related</i></b>			
Learning Support Staff Registration Fee	19,690	19,690	0
PFI Funding Gap	322,117	322,117	0
PFI Building Maintenance	48,230	48,230	0
School Rationalisations	-	4,956	(4,956)
Former Key Stage 2 Grant	1,370,822	1,370,822	0
Secondary Additional Funding	1,059,471	1,059,471	0
School Meal Admin. Utility & Telephone	423,893	413,893	10,000
Relief Supply Cover (SRB's & Maternity)	467,077	588,077	(121,000)
Copyright and Licensing (Schools)	69,461	69,461	0
	<b>3,780,761</b>	<b>3,896,717</b>	<b>(115,956)</b>
<i>Home to School/College Transport (Environment)</i>		<b>17,561</b>	<b>(17,561)</b>
<i>Early Retirement Pension Costs of School Based Staff</i>	<b>1,815,907</b>	<b>1,815,907</b>	<b>0</b>
<i>Management &amp; Support Costs</i>	<b>572,313</b>	<b>514,662</b>	<b>57,651</b>
<b><u>EXPENDITURE TO DIRECTORATE SUMMARY</u></b>	<b>104,976,523</b>	<b>105,052,440</b>	<b>(75,917)</b>

<b>EDUCATION &amp; LIFELONG LEARNING</b>	<b>Original Estimate 2018-19 £</b>	<b>Estimated Outturn 2018/19 £</b>	<b>Variance Under (Over) 2018/19 £</b>
<b><u>LEARNING, EDUCATION and INCLUSION</u></b>			
<b>Social Inclusion</b>			
Psychological Service	476,492	466,559	9,933
Behaviour Support	174,704	146,079	28,625
Education Welfare Service	404,597	414,458	(9,861)
Youth Offending Team	52,292	52,292	0
School Based Counselling	278,243	263,432	14,811
	<b>1,386,328</b>	<b>1,342,820</b>	<b>43,508</b>
<b>Additional Learning Needs</b>			
ALN Advisory Support Service	218,572	230,716	(12,144)
Learning Support	10,693	9,711	982
Professional/Statementing	63,760	62,834	926
Language Support Primary	428,848	417,189	11,659
Specialist Resources	42,239	42,355	(116)
ALN Improvement Initiative	349,478	349,478	0
Childrens Centre	46,900	46,741	159
SNAP Cymru	37,744	39,606	(1,862)
Outreach Trinity Fields	49,657	49,657	0
Speech Therapy	50,406	55,500	(5,094)
<b>SENCOM (Sensory Service)</b>	<b>715,647</b>	<b>723,992</b>	<b>(8,345)</b>
Autism	198,962	198,962	0
	<b>2,212,906</b>	<b>2,226,741</b>	<b>(13,835)</b>
<b>Learning Pathways Partnership</b>			
14 - 19 Initiative (Transport Costs)	166,967	142,944	24,023
	<b>166,967</b>	<b>142,944</b>	<b>24,023</b>
<b>EOTAS, Additional Support &amp; Out of County Provision</b>			
	<b>7,277,092</b>	<b>8,106,618</b>	<b>(829,526)</b>
<b>Early Years Provision &amp; Support</b>			
Early Years (Rising 3's)	865,868	815,878	49,990
Early Years Central Team	373,198	294,198	79,000
	<b>1,239,066</b>	<b>1,110,076</b>	<b>128,990</b>
<b>LEI Service Provision</b>			
Service Support & Resources	312,802	303,785	9,017
SACRE	2,490	2,490	0
Outdoor Education Advisor SLA	29,568	29,568	0
School Improvement	344,858	338,211	6,647
Music Service	499,949	507,432	(7,483)
WJEC & Subscriptions	35,704	38,618	(2,914)
	<b>1,225,371</b>	<b>1,220,104</b>	<b>5,267</b>

<b>EDUCATION &amp; LIFELONG LEARNING</b>	<b>Original Estimate 2018-19 £</b>	<b>Estimated Outturn 2018/19 £</b>	<b>Variance Under (Over) 2018/19 £</b>
<b>Education Achievement Service (EAS) &amp; Regional Grant Match Funding</b>			
Contribution to EAS Joint Working	1,070,012	1,041,858	28,154
Education Improvement Grant - Match Funding	659,389	631,964	27,425
	1,729,401	1,673,822	55,579
<b>EXPENDITURE TO DIRECTORATE SUMMARY</b>	<b>15,237,131</b>	<b>15,823,125</b>	<b>(585,994)</b>
<b><u>LIFELONG LEARNING</u></b>			
Community Education	1,663,832	1,618,440	45,392
Library Service	2,595,826	2,418,132	177,694
LLL Insurance & Non Operational Property/Land	90,391	89,927	464
<b><u>EXPENDITURE TO SERVICE SUMMARY</u></b>	<b>4,350,049</b>	<b>4,126,499</b>	<b>223,550</b>